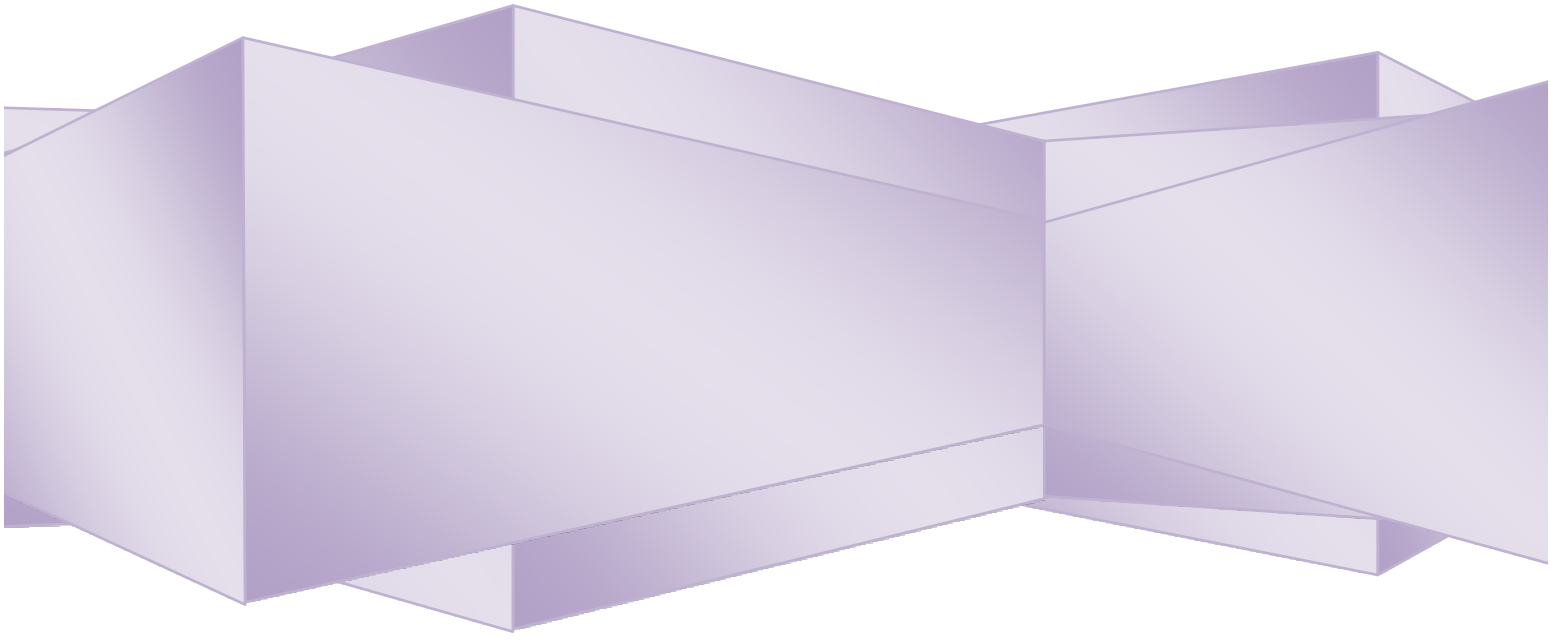
Starkey International School of Household Management

HQ Software Manual



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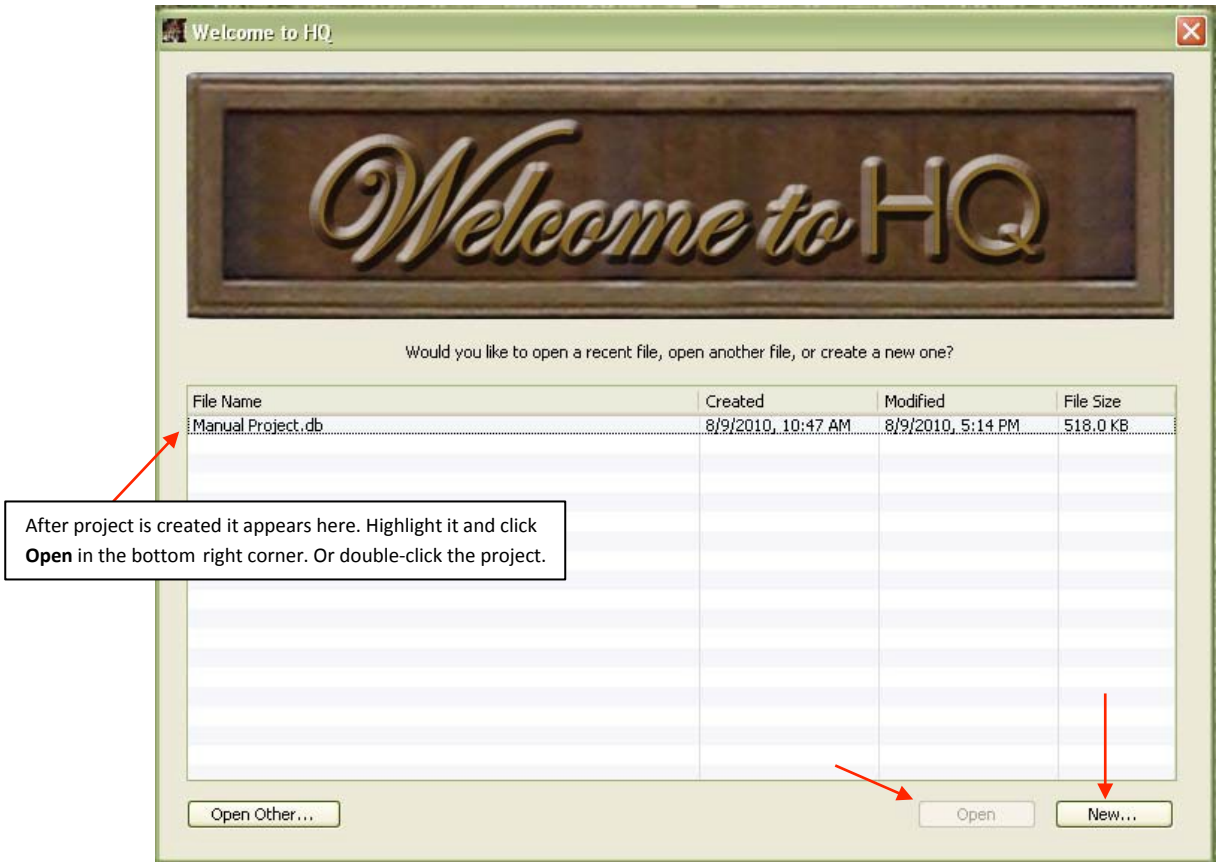
Welcome to Starkey's HQ Private Service Management Software. You have purchased this software to aid you in your household management work. Once you have installed the software you are ready to begin using the program.

Creating a New Project

1) Find the Starkey HQ icon on the desktop of your computer and double-click the icon.
    a. The **Welcome to HQ** screen appears. You will be asked: "Would you like to open a recent file, open another project, or create a new one?"


Welcome to HQ
Welcome to HQ
Would you like to open a recent file, open another file, or create a new one?
File Name
Created
Modified
File Size
Manual Project.db
8/9/2010, 10:47 AM
8/9/2010, 5:14 PM
518.0 KB
After project is created it appears here. Highlight it and click **Open** in the bottom right corner. Or double-click the project.
Open Other...
Open
New...

2) In the lower right hand corner of the screen click **New…**
    a. The computer save screen will appear.

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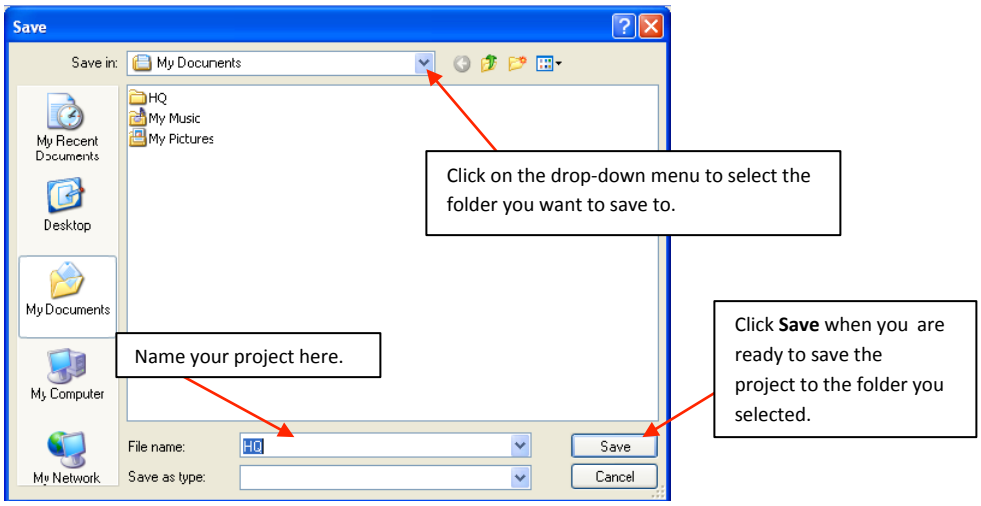
b. You can save your project anywhere on the computer's hard drive.
    i. You **cannot** save the project on any removable hardware as it will not open on any other computer.



3) Once you have named and saved your project The Starkey Service Management Model screen will appear with the **People** window. The **People** window will only appear at the initial install of the software.

GREAT YOU HAVE SUCCESSFULLY CREATED A NEW PROJECT!

Note: The **People** window will appear and you will want to create yourself as the household manager, followed by adding all individuals in your service environment. See next page on how to add people to the software.

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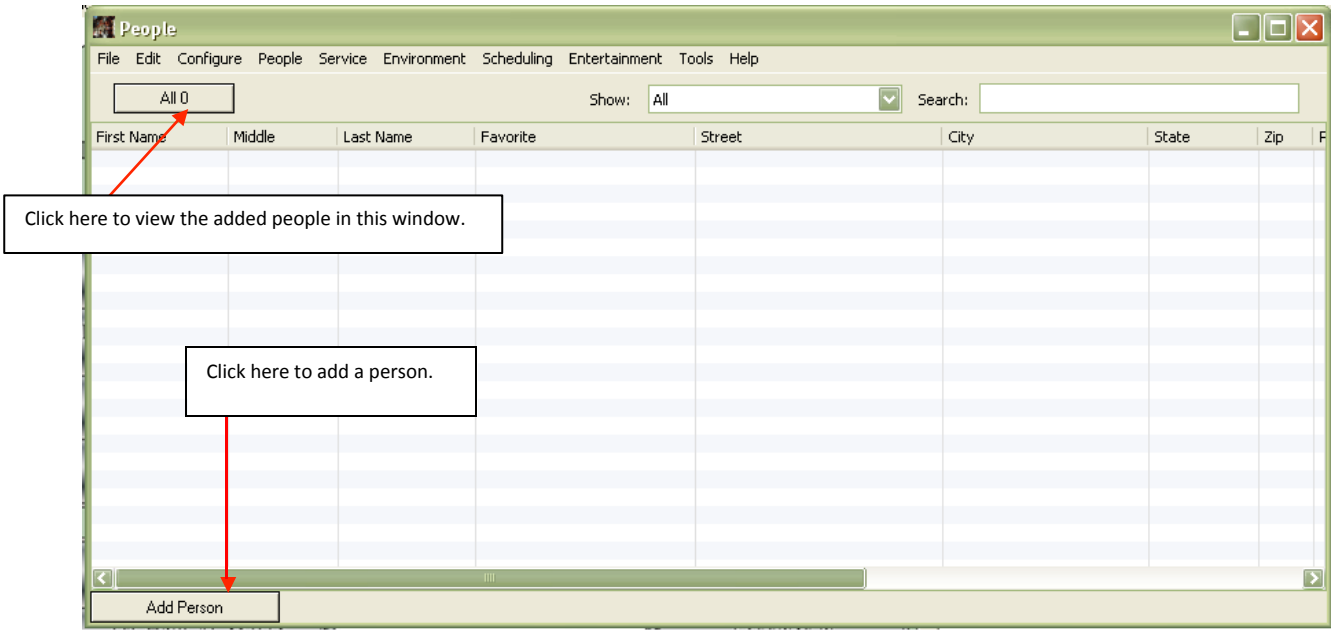
Section 1: The People

People Profiles

The People is a term to include all persons participating in the Service relationship: all those receiving service such as the Principals, family members, residents, Guests, and all those providing service such as full and part time staff, support resource persons, and vendors. People profiles in the Starkey Software include all of the people listed above.



1) Click **Add Person** in the lower left hand corner of the screen. When you come back to this page once you have left it, click **All (number)** in the upper left hand side of the screen to show all the people profiles added.

2) **AFTER** you have created a profile the name of the person you created will appear in this same window. To open the individual's profile again, highlight the name you wish to open and double-click it.

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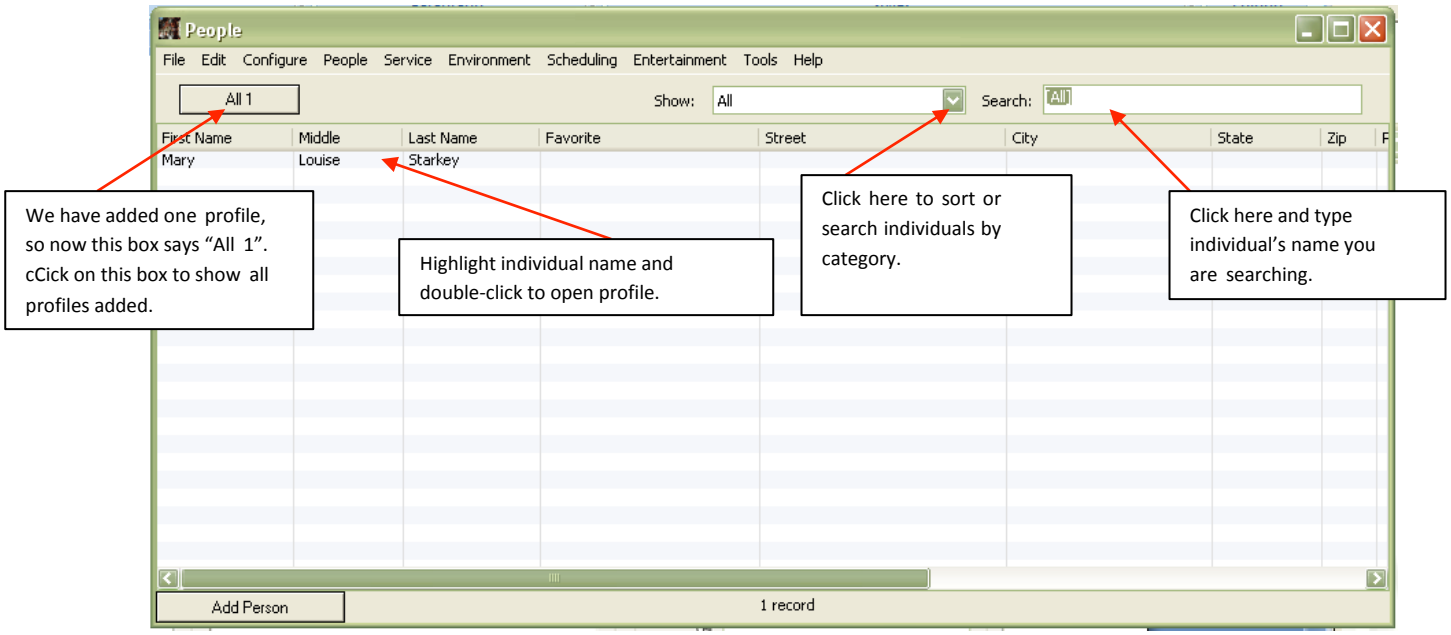
3) If you need to search for a person, click the search field and type the individual's name you are searching for. You can also search by employee, principal, guest, vendor, etc. by clicking the **Show** drop-down menu.


People
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
All 1
Show: All
Search: All
First Name Middle Last Name Favorite Street City State Zip
Mary Louise Starkey
Add Person
1 record
We have added one profile, so now this box says "All 1". cCick on this box to show all profiles added.
Highlight individual name and double-click to open profile.
Click here to sort or search individuals by category.
Click here and type individual's name you are searching.

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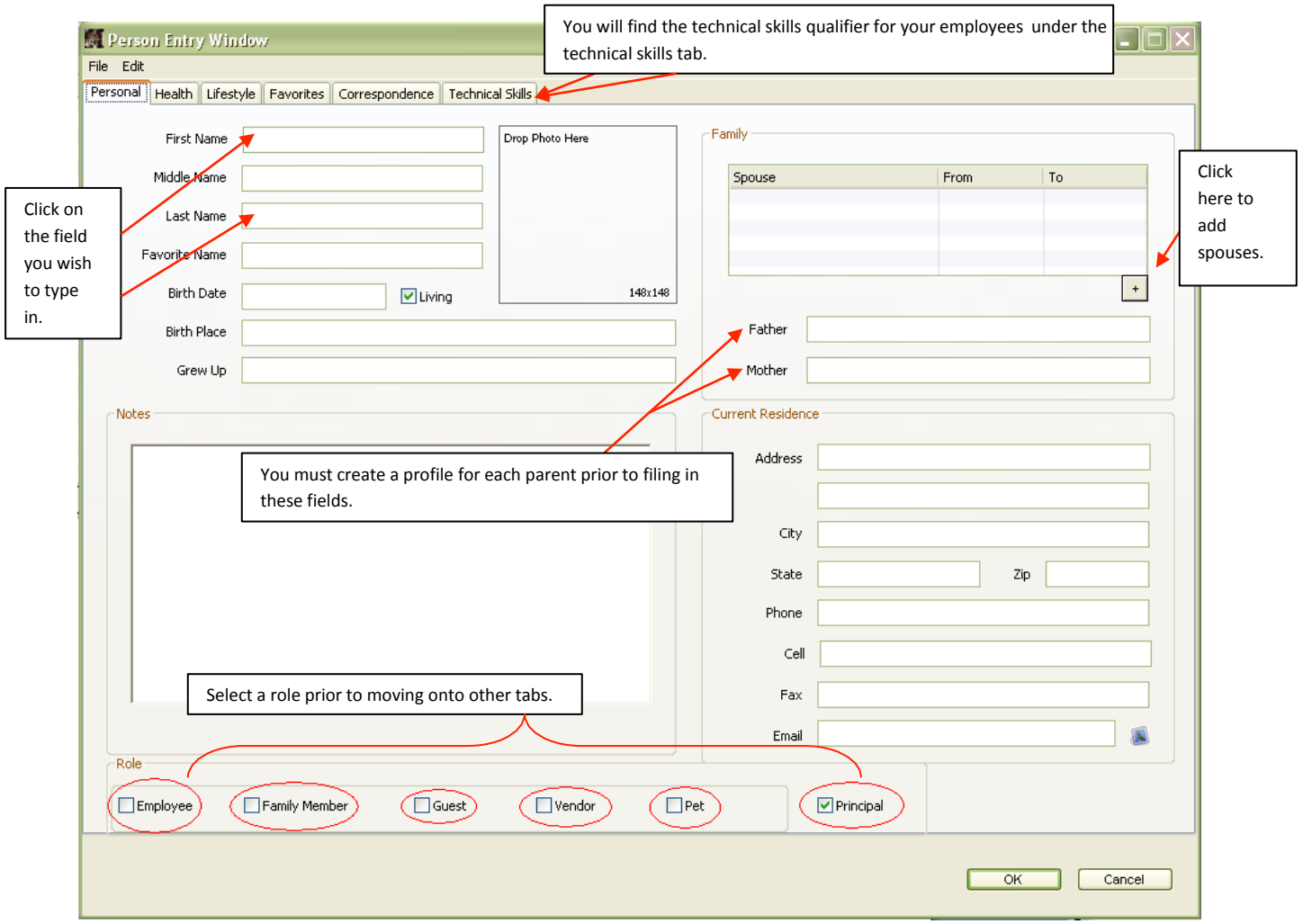
4) The **Person Entry Window** also known as a Profile will appear.
   a. At the top of the page are six tabs. Each tab has information to be completed according to the person you are making a profile for. For example, when making a profile for a principal, complete the information in the following tabs: Personal, Health, Lifestyle, Favorites, and Correspondence. If you are completing a profile for your staff member, fill out the Personal, Health, Lifestyle and Technical Skills tabs.
   b. At the bottom toward the left side of the page is a series of six boxes indicating the profile you are creating. If you are creating a profile for a staff member, check the Employee box. If you are creating a profile for a principal, check the Principal box.
   c. Under each tab, fill out different kinds of information. Simply click the field you wish to type in and begin typing.
   d. If you see the + symbol, you must click it to add information to the fields.
   e. In the family section on the Personal tab, there are two fields for Father and Mother. Prior to filling in these fields you must create a profile for those two individuals.
   f. To save any information at anytime you MUST click **OK**.
      i. You will lose any new information if you click the red X in the top right hand corner or **Cancel** in the lower right hand corner.



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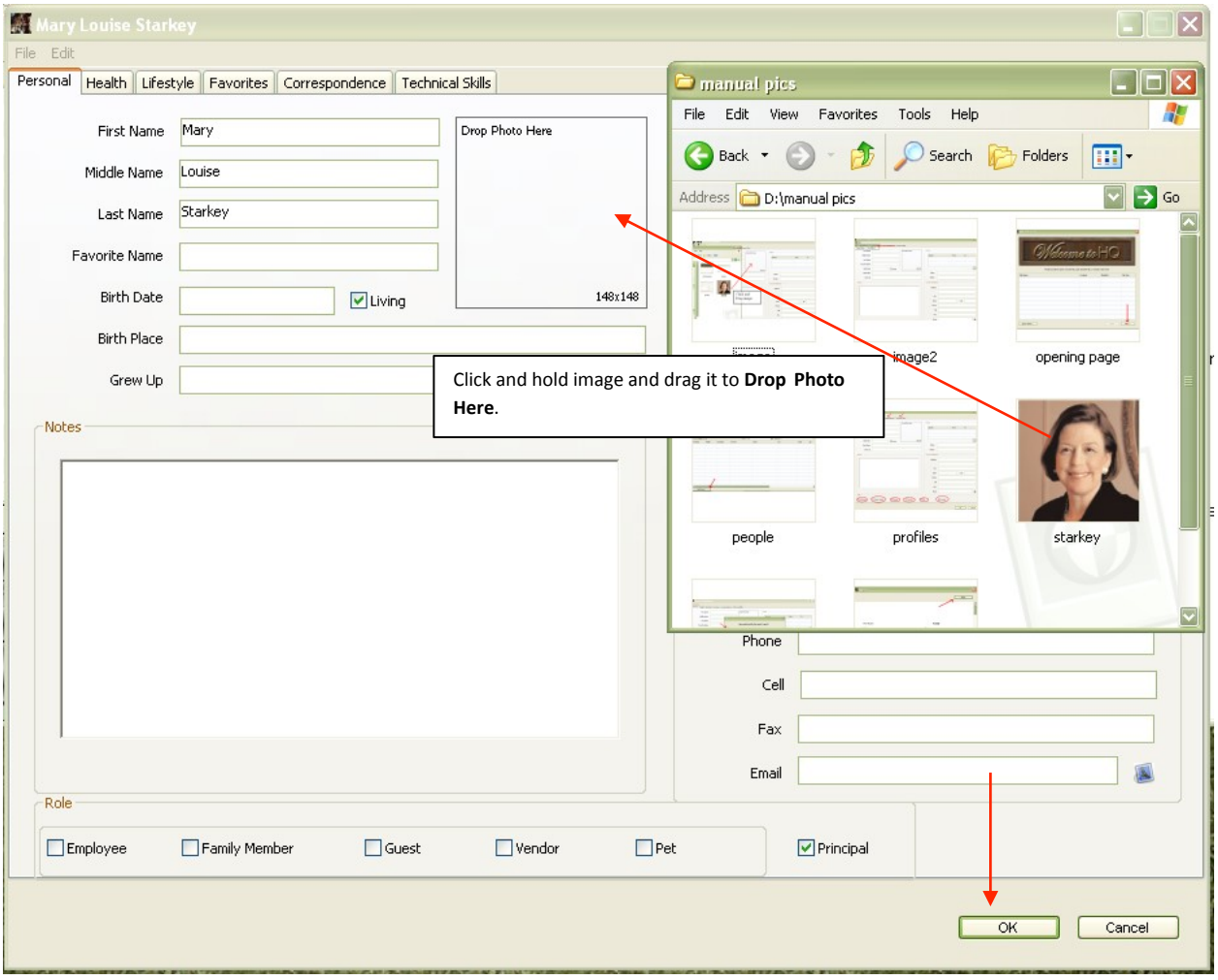
5) Adding a picture to the Profile.
    a. Start by having the Personal tab open to where you want to add the photo.
    b. Then open where you keep your photos on your computer.
    c. Have both windows open side by side.
    d. Click and hold on the photo you would like to add and drag it into **Drop Photo Here**.

6) When you are ready to leave this page click **OK** to save.



7) **Note**: This will be the way you will add images in all parts of the software.

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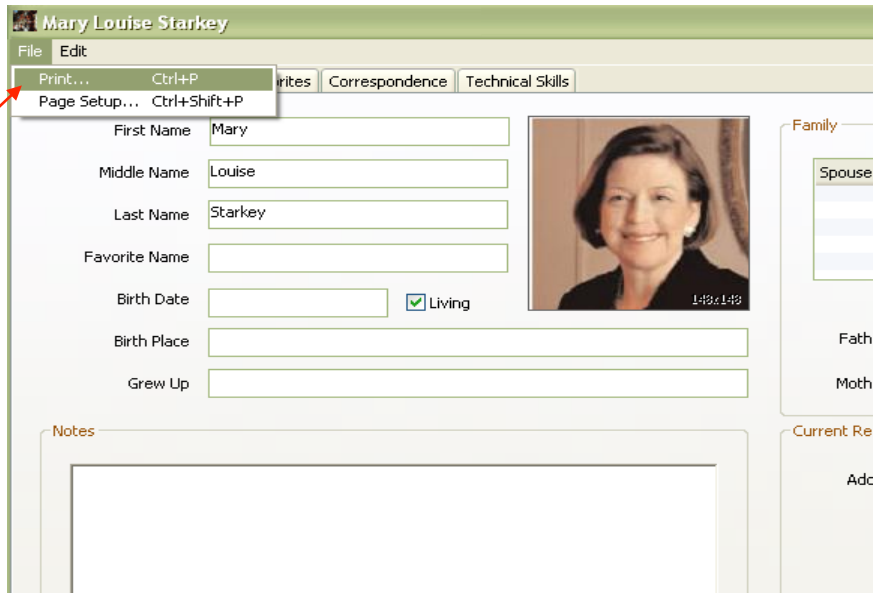
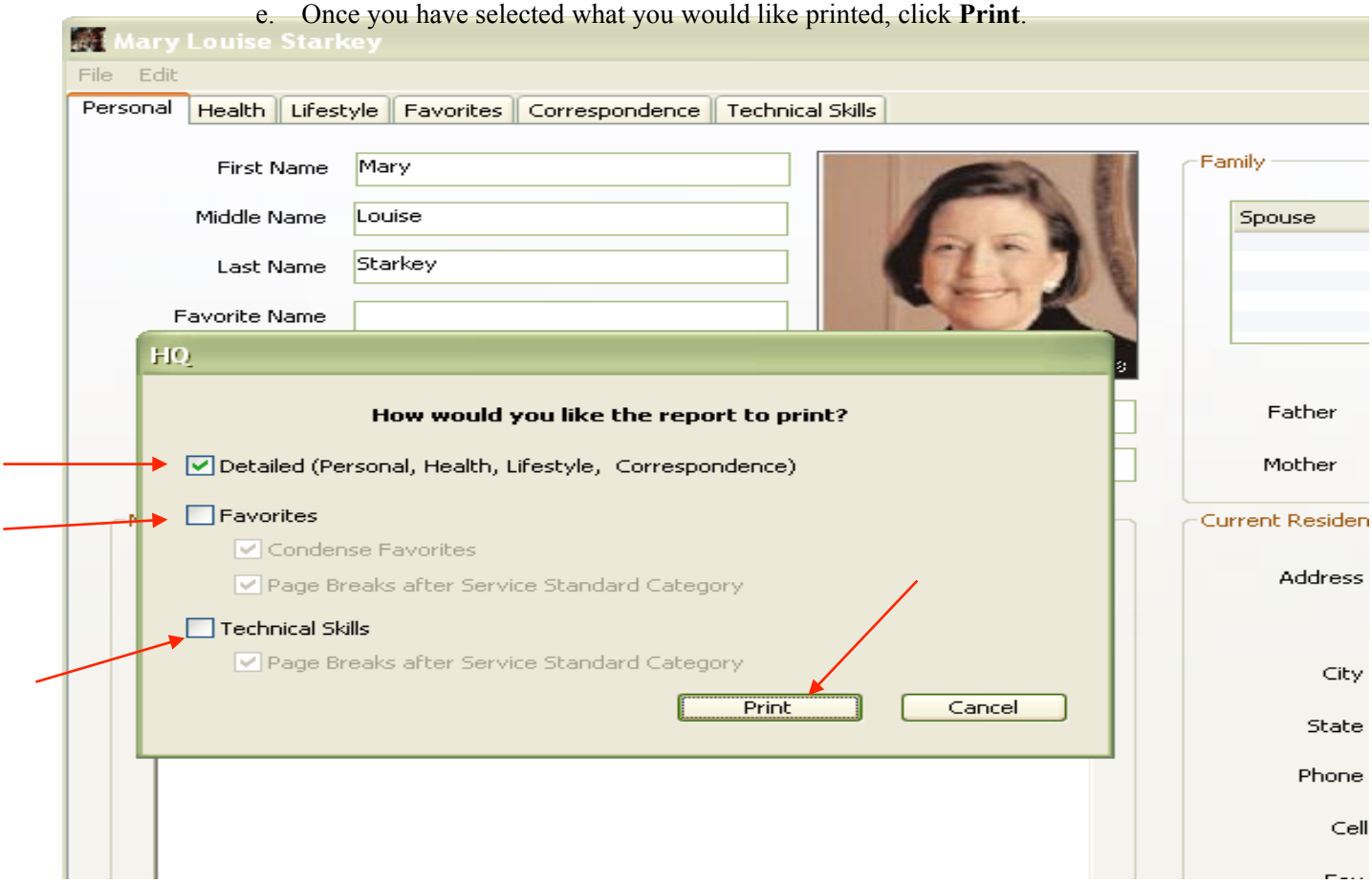
8) When you are ready to print a profile:
   a. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK**.
   b. Click **File** / **Print**.



   c. A window will appear asking you "How would you like the report to print?"
   d. You can select what you want to print for the profile by checking the Detailed box, Favorites box, or Technical Skills box.
   e. Once you have selected what you would like printed, click **Print**.



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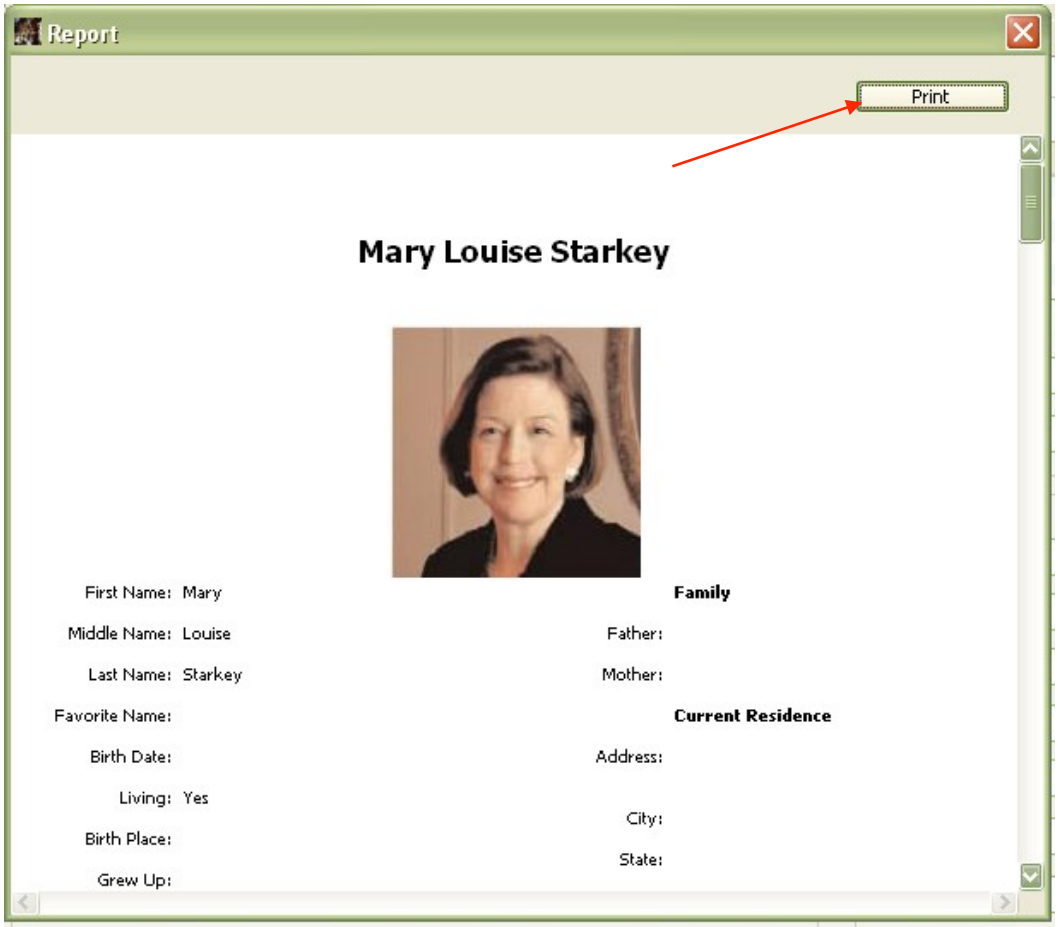
f. A print screen will appear for you to preview what the page will look like on paper.
g. In the upper right hand corner, click **Print.**



g. The computer print screen will appear.
h. Select the printer you would like to print from.
i. Click **Print** at the bottom right hand corner of the screen.
j. To exit this screen, click the red **X** in upper left hand corner.
k. This will take you back to the main profile page. Click another tab category to continue working or to exit the profile screen, click **OK** in bottom right hand corner.

YOU SHOULD NOW HAVE A PRINTED PROFILE

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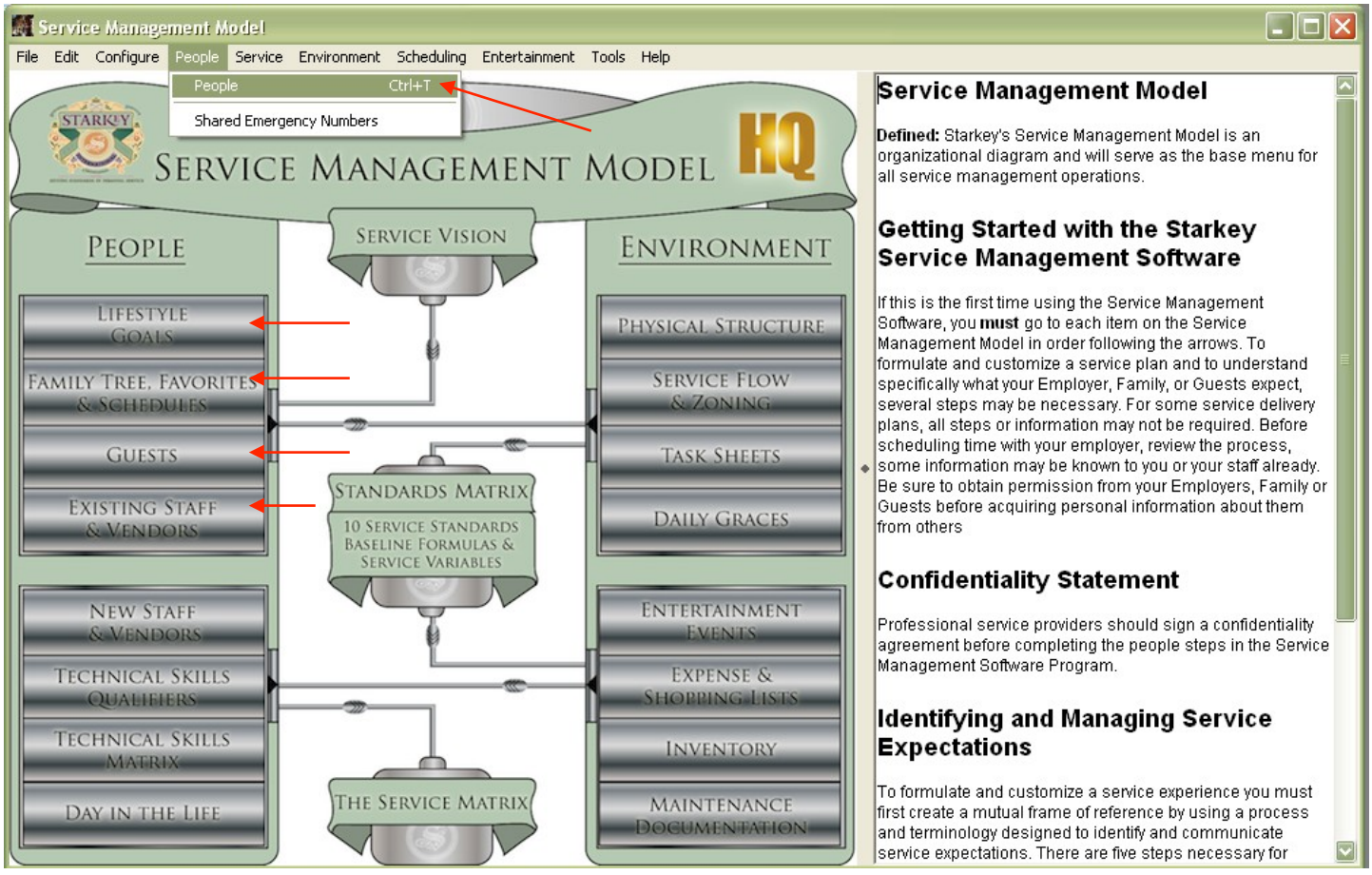
Notes About Entering People

- The Starkey Management Service Model will appear after you have created at least one person in the people profiles.
- From this point on, when you open the software from your desktop, the main Starkey Management Service Model will appear, not the people window.
- To access the people:
    a. Go to the main Management Model page.
    b. Click on one of the following boxes under the People column: Lifestyle Goals, Family Tree, Favorites & Schedules, Guests, Existing Staff & Vendors." Or, click **People** in the menu and scroll down to click **People**.
- In the Starkey Software when you click "Existing Staff & Vendors" the People Profile window appears. To add an employee, make sure to select "Employee" at the bottom of the profile screen. Then complete the Technical Skills tab. See the screenshot on the next page.


Service Management Model
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
People Ctrl+T
Shared Emergency Numbers
STARKEY
SERVICE MANAGEMENT MODEL
HQ
PEOPLE
SERVICE VISION
ENVIRONMENT
LIFESTYLE GOALS
FAMILY TREE, FAVORITES & SCHEDULES
GUESTS
EXISTING STAFF & VENDORS
PHYSICAL STRUCTURE
SERVICE FLOW & ZONING
TASK SHEETS
DAILY GRACES
STANDARDS MATRIX
10 SERVICE STANDARDS BASELINE FORMULAS & SERVICE VARIABLES
NEW STAFF & VENDORS
TECHNICAL SKILLS QUALIFIERS
TECHNICAL SKILLS MATRIX
DAY IN THE LIFE
ENTERTAINMENT EVENTS
EXPENSE & SHOPPING LISTS
INVENTORY
MAINTENANCE DOCUMENTATION
THE SERVICE MATRIX
Service Management Model
Defined: Starkey's Service Management Model is an organizational diagram and will serve as the base menu for all service management operations.
Getting Started with the Starkey Service Management Software
If this is the first time using the Service Management Software, you must go to each item on the Service Management Model in order following the arrows. To formulate and customize a service plan and to understand specifically what your Employer, Family, or Guests expect, several steps may be necessary. For some service delivery plans, all steps or information may not be required. Before scheduling time with your employer, review the process, some information may be known to you or your staff already. Be sure to obtain permission from your Employers, Family or Guests before acquiring personal information about them from others
Confidentiality Statement
Professional service providers should sign a confidentiality agreement before completing the people steps in the Service Management Software Program.
Identifying and Managing Service Expectations
To formulate and customize a service experience you must first create a mutual frame of reference by using a process and terminology designed to identify and communicate service expectations. There are five steps necessary for

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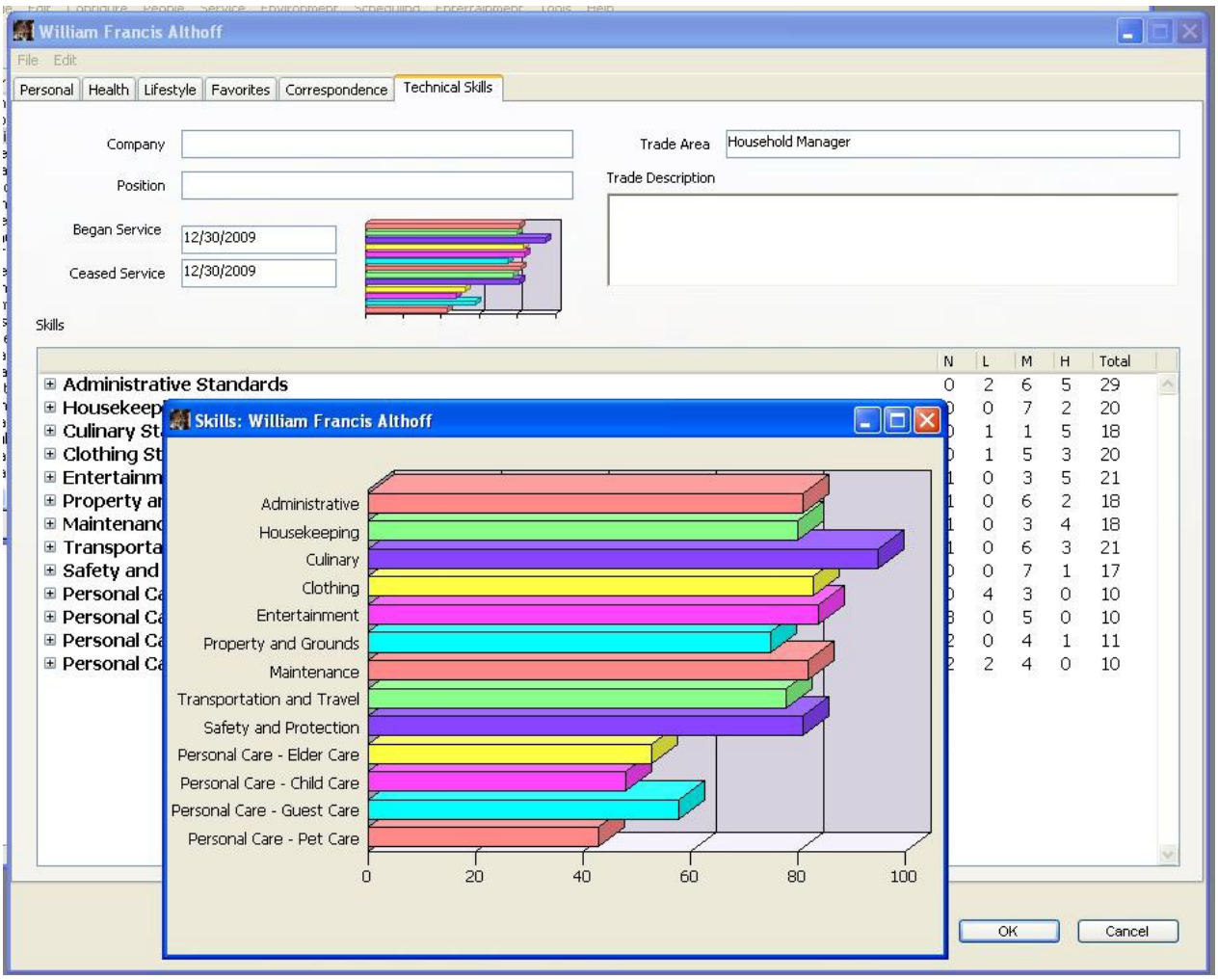

This is what the Technical Skills tab should look like once you have completed it. The graph is created from the completed qualifier.

Add Shared Emergency Numbers

1) Click **People** / **Shared Emergency Numbers** from the main menu.
2) Click **Add Shared Emergency Number**.
3) Enter Name, Phone, and Description. Click **OK.**

Section 2: Backup

The software is designed to automatically backup and save every time you click **OK** in a window. It is also set to automatically back up at regular intervals. To view or change the Backup settings:

1) Click **Edit** / **Preferences** from the main menu. Note: On a Mac, click **Starkey HQ** / **Preferences**.

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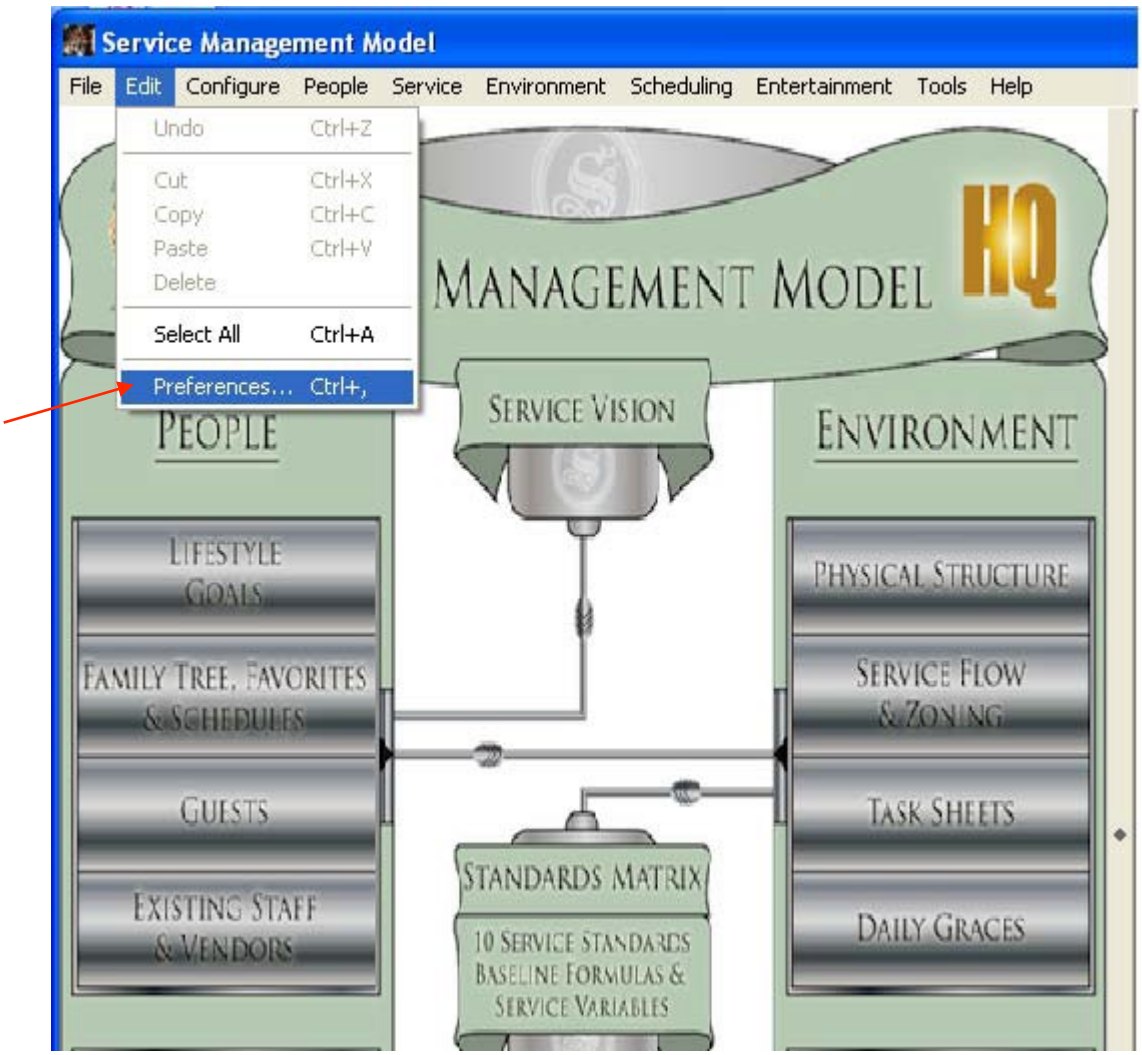

2) The Preferences screen will appear.
3) The **Backup on Start Up** option is selected. This ensures that the data is backed up when the software starts. Keep this option selected.
4) The **Timed Backups** option is also selected. The default is 60 minutes. If you would like to back up more or less frequently, change that number.
5) The software displays when the last backup was performed and allows you to back up instantly by clicking the Backup Now button.
6) The **Show Service Management Model on Start Up** is also selected. Keep that option selected unless you do not want to see the main Service Management window when you open the software.

Note: The backup files are created in the folder on your computer where you created your new project. A folder is automatically created under your project name called: backups. Within that folder are the backup databases named with the date and time the backup was completed.

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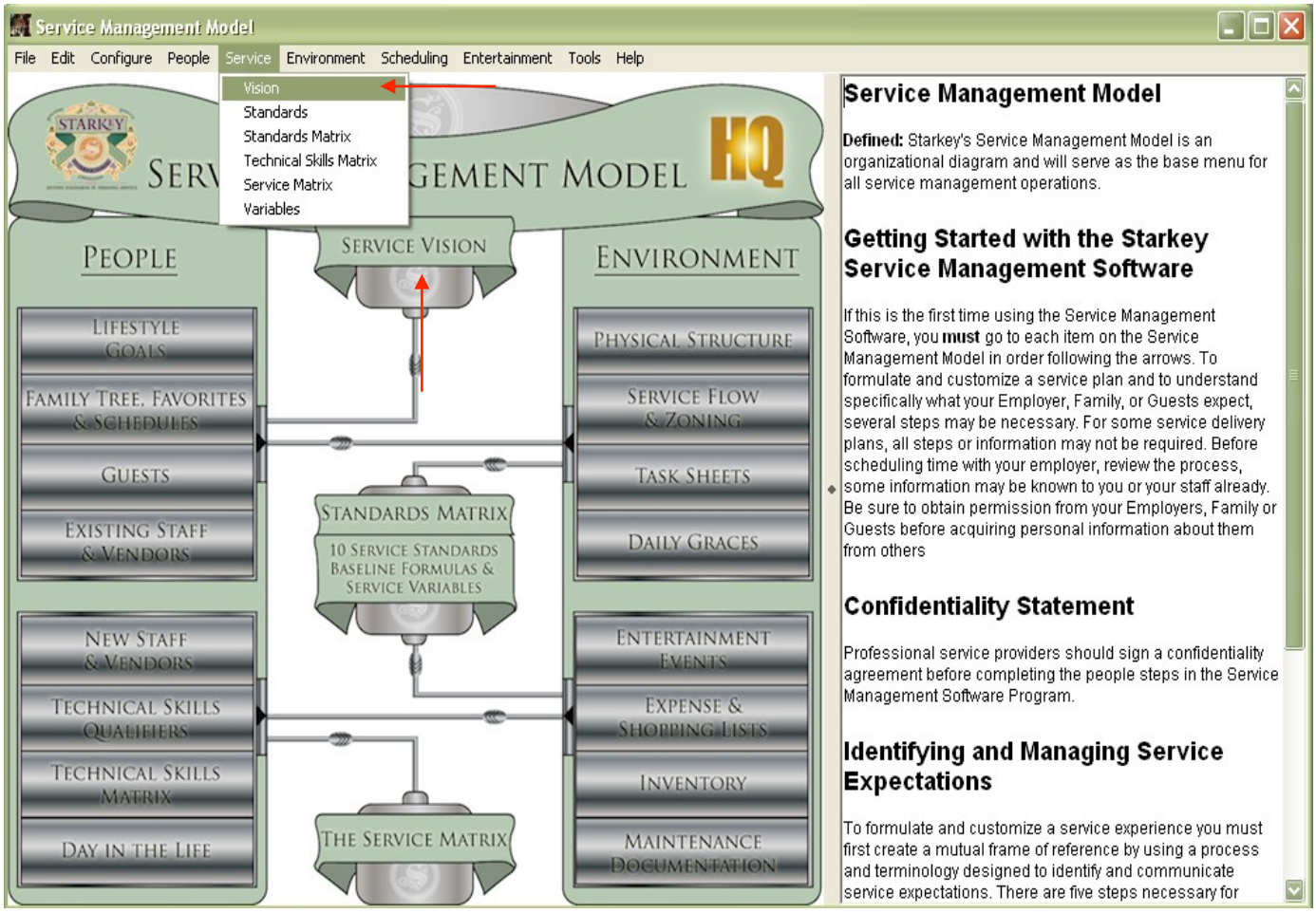
Now that you have created a new project and added people, you are ready to get started using the software following The Management Model. The software is designed to follow the Management Model starting with The Service Vision and finishing with The Service Matrix.

Section 3: The Service Vision

By now you have thought about the desired Lifestyle and quality of life for The People and The Environment which are the two columns that make up the Management Model. You are now ready to create a Service Vision for the home.

1) Click **Service Vision** at the top of the Model. Or, from the main menu, click **Service** / **Vision**.
2) The Service Vision screen will appear.


Service Management Model
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
Vision
Standards
Standards Matrix
Technical Skills Matrix
Service Matrix
Variables
STARKEY
HQ
PEOPLE
SERVICE VISION
ENVIRONMENT
LIFESTYLE GOALS
FAMILY TREE, FAVORITES & SCHEDULES
GUESTS
EXISTING STAFF & VENDORS
NEW STAFF & VENDORS
TECHNICAL SKILLS QUALIFIERS
TECHNICAL SKILLS MATRIX
DAY IN THE LIFE
STANDARDS MATRIX
10 SERVICE STANDARDS BASELINE FORMULAS & SERVICE VARIABLES
THE SERVICE MATRIX
PHYSICAL STRUCTURE
SERVICE FLOW & ZONING
TASK SHEETS
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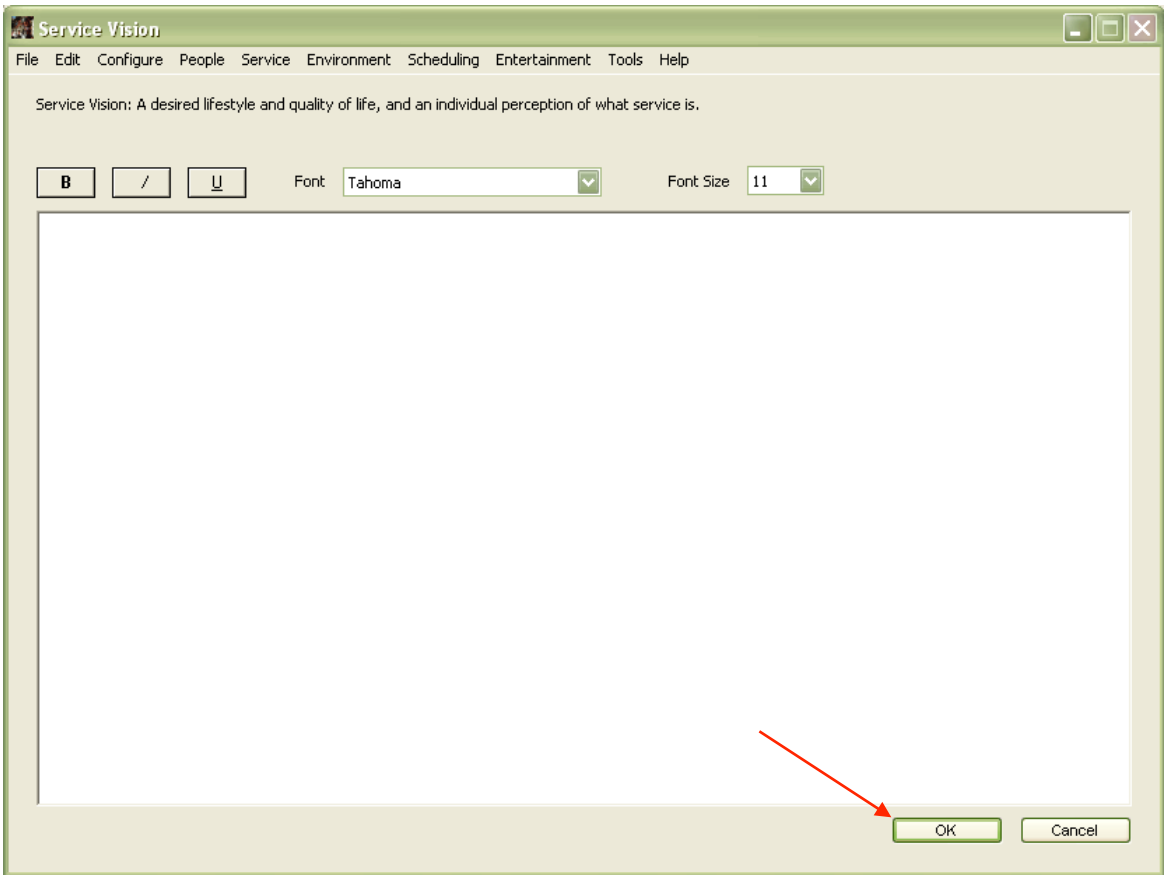
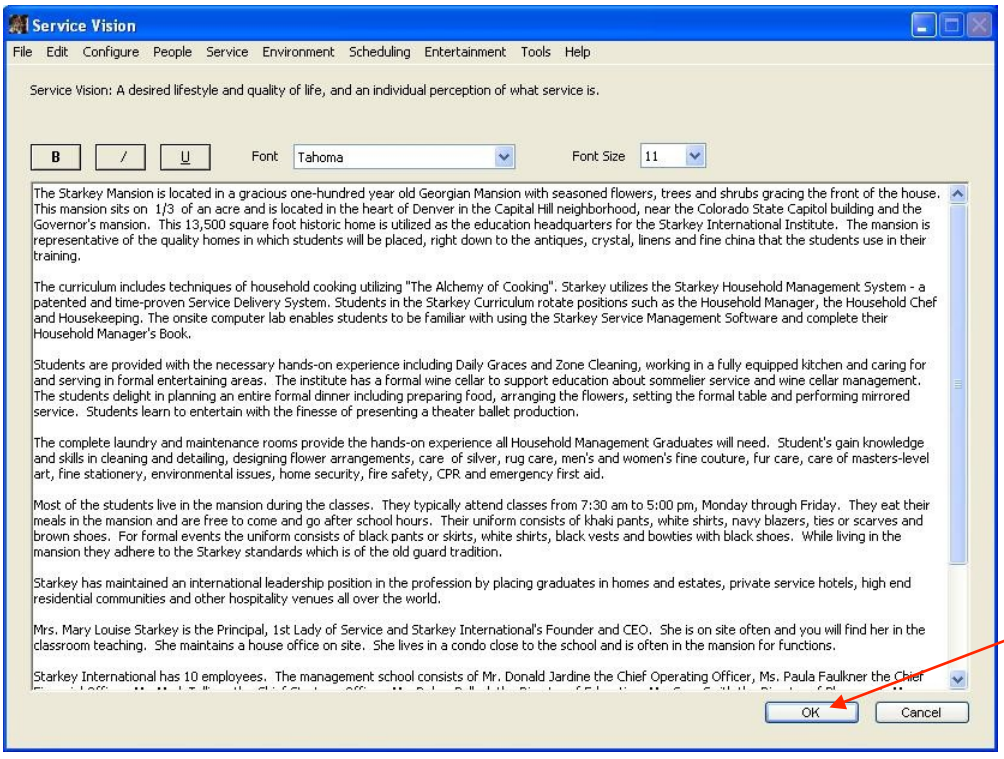

Service Vision
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
Service Vision: A desired lifestyle and quality of life, and an individual perception of what service is.
B I U Font Tahoma Font Size 11
OK
Cancel

3) Here you can type the Service Vision for your home. You can also type your Service Vision in Microsoft Word and copy and paste it to this screen.


Service Vision
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
Service Vision: A desired lifestyle and quality of life, and an individual perception of what service is.
B I U Font Tahoma Font Size 11
The Starkey Mansion is located in a gracious one-hundred year old Georgian Mansion with seasoned flowers, trees and shrubs gracing the front of the house. This mansion sits on 1/3 of an acre and is located in the heart of Denver in the Capital Hill neighborhood, near the Colorado State Capitol building and the Governor's mansion. This 13,500 square foot historic home is utilized as the education headquarters for the Starkey International Institute. The mansion is representative of the quality homes in which students will be placed, right down to the antiques, crystal, linens and fine china that the students use in their training.
The curriculum includes techniques of household cooking utilizing "The Alchemy of Cooking". Starkey utilizes the Starkey Household Management System - a patented and time-proven Service Delivery System. Students in the Starkey Curriculum rotate positions such as the Household Manager, the Household Chef and Housekeeping. The onsite computer lab enables students to be familiar with using the Starkey Service Management Software and complete their Household Manager's Book.
Students are provided with the necessary hands-on experience including Daily Graces and Zone Cleaning, working in a fully equipped kitchen and caring for and serving in formal entertaining areas. The institute has a formal wine cellar to support education about sommelier service and wine cellar management. The students delight in planning an entire formal dinner including preparing food, arranging the flowers, setting the formal table and performing mirrored service. Students learn to entertain with the finesse of presenting a theater ballet production.
The complete laundry and maintenance rooms provide the hands-on experience all Household Management Graduates will need. Student's gain knowledge and skills in cleaning and detailing, designing flower arrangements, care of silver, rug care, men's and women's fine couture, fur care, care of masters-level art, fine stationery, environmental issues, home security, fire safety, CPR and emergency first aid.
Most of the students live in the mansion during the classes. They typically attend classes from 7:30 am to 5:00 pm, Monday through Friday. They eat their meals in the mansion and are free to come and go after school hours. Their uniform consists of khaki pants, white shirts, navy blazers, ties or scarves and brown shoes. For formal events the uniform consists of black pants or skirts, white shirts, black vests and bowties with black shoes. While living in the mansion they adhere to the Starkey standards which is of the old guard tradition.
Starkey has maintained an international leadership position in the profession by placing graduates in homes and estates, private service hotels, high end residential communities and other hospitality venues all over the world.
Mrs. Mary Louise Starkey is the Principal, 1st Lady of Service and Starkey International's Founder and CEO. She is on site often and you will find her in the classroom teaching. She maintains a house office on site. She lives in a condo close to the school and is often in the mansion for functions.
Starkey International has 10 employees. The management school consists of Mr. Donald Jardine the Chief Operating Officer, Ms. Paula Faulkner the Chief
OK
Cancel

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4) Once you ready to navigate away from the Service Vision, click **OK** at the bottom right hand corner. **This will save your Service Vision**. If for any reason you need to go away from this screen while typing your Service Vision, by clicking **OK** you are saving the document as you are completing it.
5) When you are ready to print your Service Vision follow these steps.
    a. Have the Service Vision screen with the complete Service Vision in it open.
    b. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK**.
    c. From the menu, click **File** / **Print**.
    d. A print screen will appear for you to preview what the page will look like on paper.
    e. In the upper right hand corner click **Print**.
    f. The computer print screen will appear.
    g. Select the printer you would like to print from.
    h. Click **Print** at the bottom right hand corner of the screen.

YOU SHOULD NOW HAVE A PRINTED SERVICE VISION

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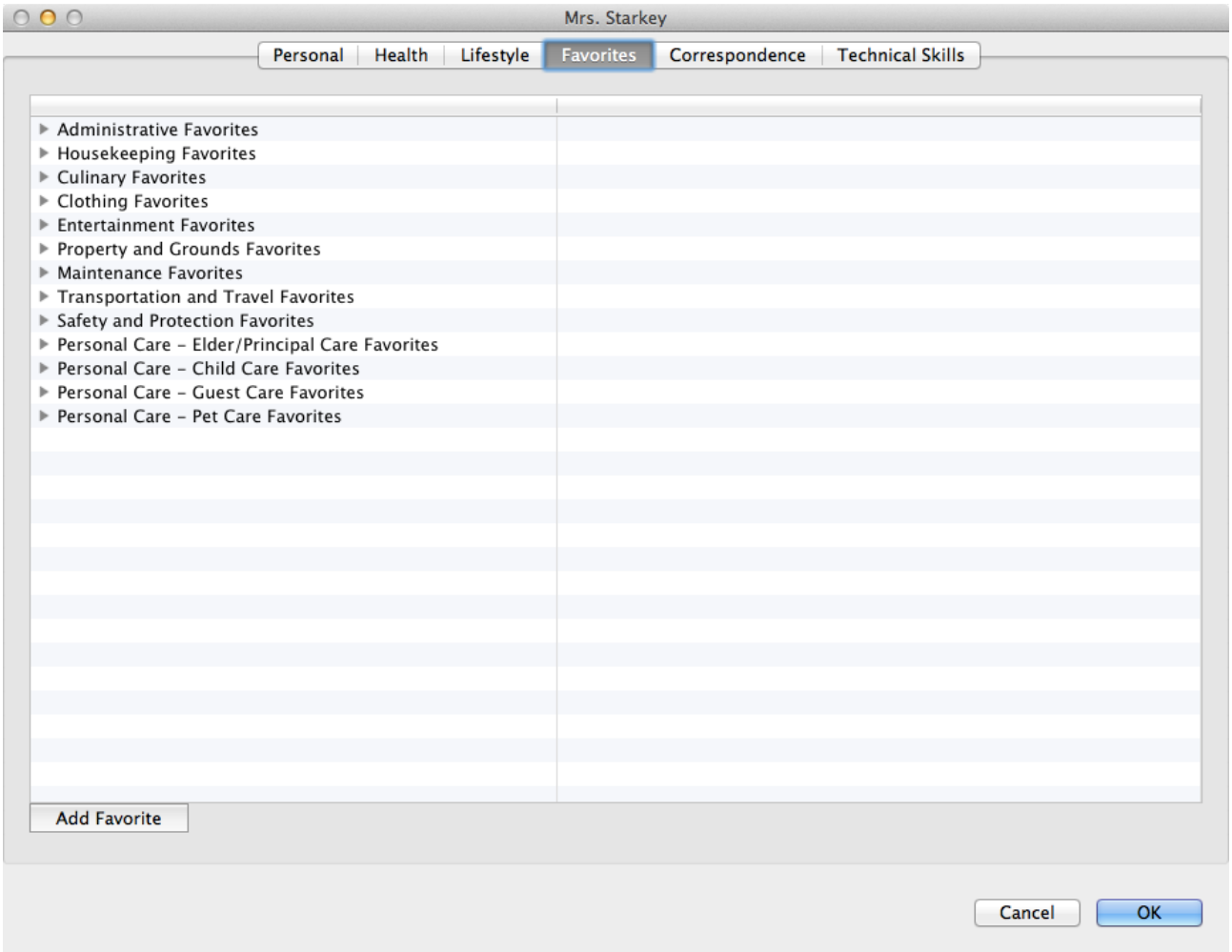
Section 4: Favorites

Creating Favorites

Favorites are created for principals and resident members of the home. Favorites are created for guests when they are in the service environment. Use sentences that include: prefers, likes, wants, needs, dislikes, never, etc. to create the favorite.

1) Open a people profile (principal, family member, or guest) and click the **Favorites** tab. To expand the ten categories, click the + symbol next to each category and sub category. When you see there is no + or – symbol next to a subcategory, you are ready to add a favorite to the category. You only need 5-8 favorites for each of the ten categories.



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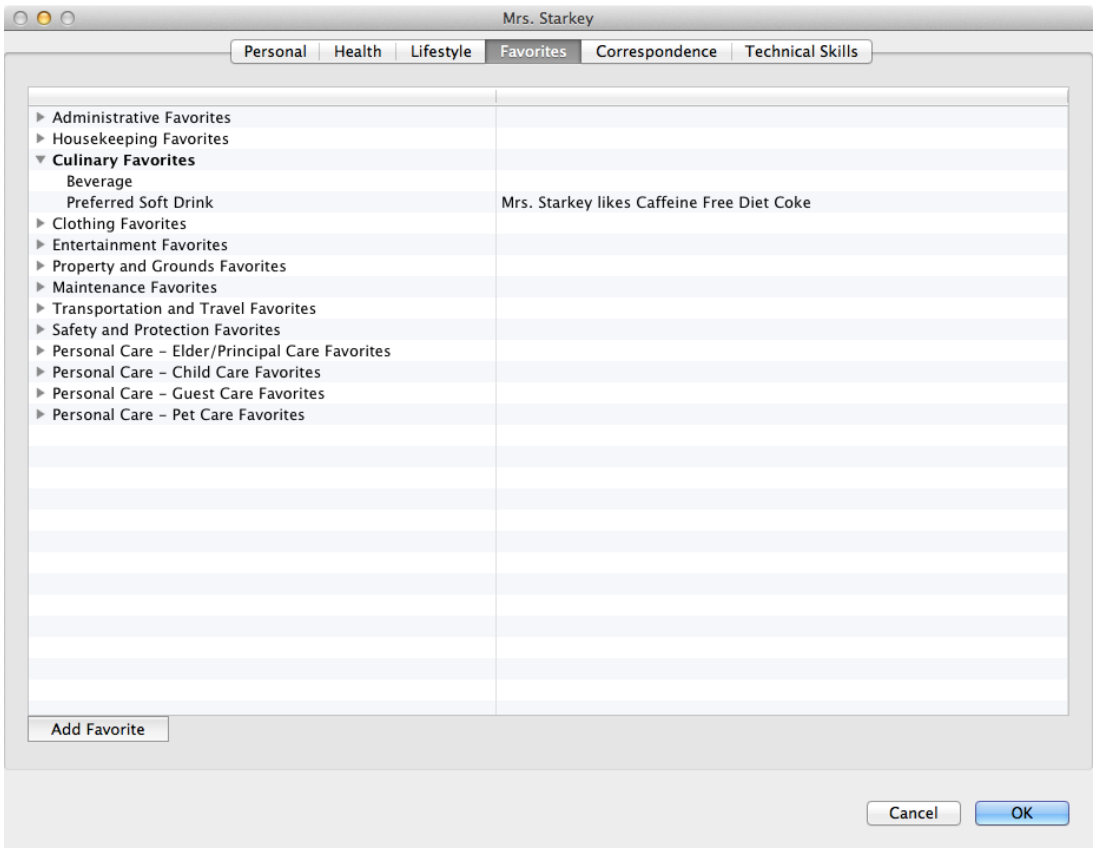
2) To add a favorite, highlight the field you want to add to. Click **Add Favorite** at the bottom left of the screen. The field opens below what you highlighted. You can then add the favorite to the field you have selected. For example, if you were adding to Preferred Soft Drink as shown below, you would type: Mrs. Starkey likes Caffeine Free Diet Coke. When you have added to the field you selected you can just click another field and continue to add your favorites using the same steps.
3) When you are ready to leave this page you **MUST click OK** to save the information you have added.
4) **Note**: Some favorites may overlap between principals or other individuals in your environment. This is fine. Add the same favorite to each profile separately.



5) When you are ready to Print:
    a. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK**.
    b. Click **File** / **Print**.
    c. A window will appear asking you "How would you like the report to print?"
    d. You can select what you want to print for the profile, by checking the Detailed box, Favorites box, or Technical Skills box.
        i. If you only want favorites, check the Favorites box only.
        ii. You will see two boxes under the checked Favorites box: Condense Favorites and Page Breaks after Service Standard Category.
        iii. If you would like each favorite standard to start on a new page, click

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Page Breaks after Service Standard Category.

iv. If you would like to condense the favorites to only the favorites you have typed, click **Condense Favorites**.

YOU SHOULD NOW HAVE PRINTED FAVORITES

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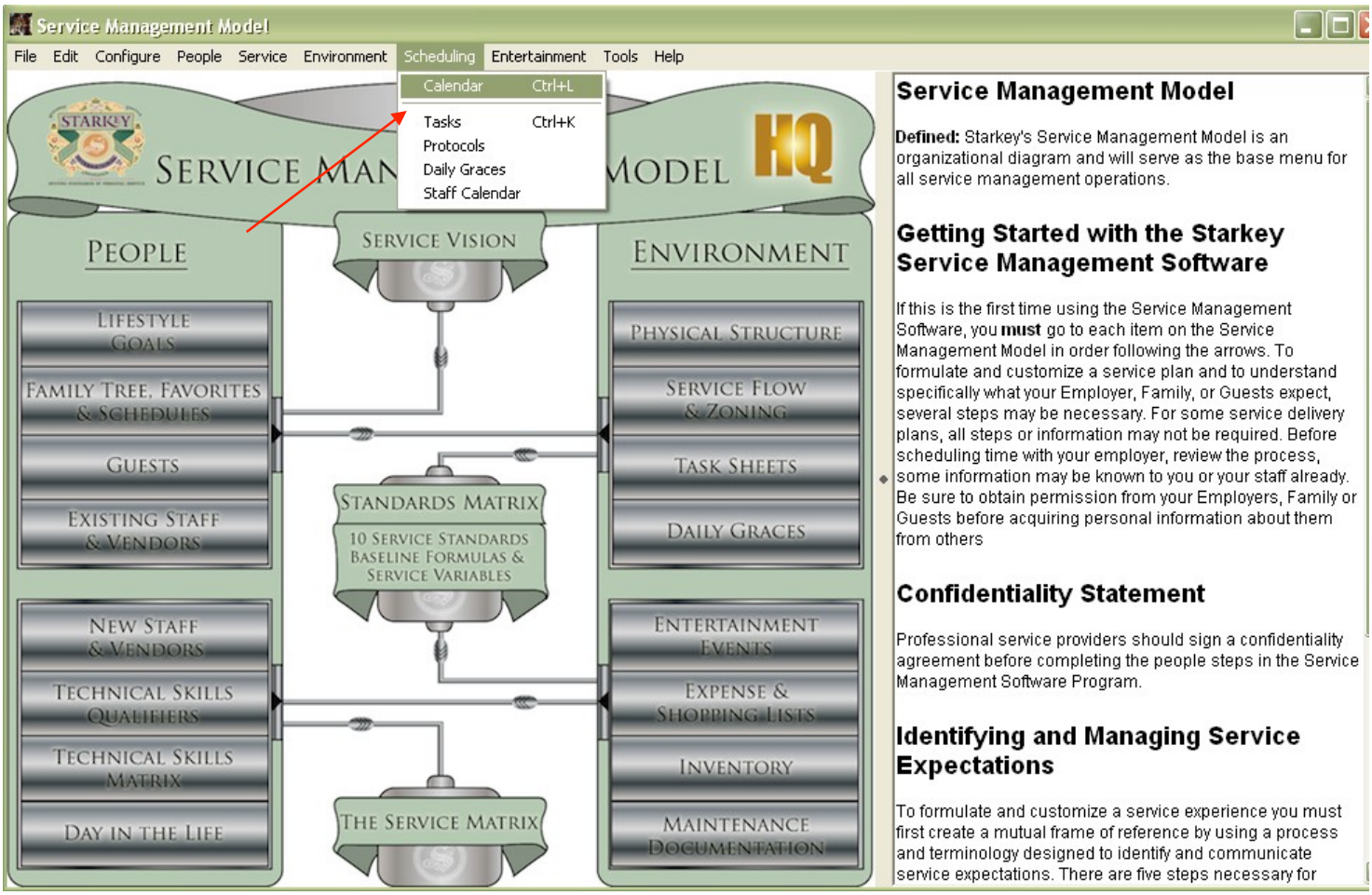
Section 5: Family Schedules and Day in the Life

Using calendar and creating a Schedule or Day in the Life

Creating family schedules could be a part of your administrative duties while managing a household. The Starkey Software is designed to aid you in the scheduling process. Over and above creating family schedules, you will be asked to create Day in the Life Schedules. The Day in the Life as you have learned is a management tool which provides a time-oriented schedule, listing the duties for each day with the approximate starting and ending times for each employee.

1) From the main menu, click **Scheduling** / **Calendar**.


Service Management Model
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
Calendar Ctrl+L
Tasks Ctrl+K
Protocols
Daily Graces
Staff Calendar
HQ
PEOPLE
SERVICE VISION
ENVIRONMENT
LIFESTYLE GOALS
FAMILY TREE, FAVORITES & SCHEDULES
GUESTS
EXISTING STAFF & VENDORS
PHYSICAL STRUCTURE
SERVICE FLOW & ZONING
TASK SHEETS
DAILY GRACES
STANDARDS MATRIX
10 SERVICE STANDARDS BASELINE FORMULAS & SERVICE VARIABLES
NEW STAFF & VENDORS
TECHNICAL SKILLS QUALIFIERS
TECHNICAL SKILLS MATRIX
DAY IN THE LIFE
ENTERTAINMENT EVENTS
EXPENSE & SHOPPING LISTS
INVENTORY
MAINTENANCE DOCUMENTATION
THE SERVICE MATRIX
Service Management Model
Defined: Starkey's Service Management Model is an organizational diagram and will serve as the base menu for all service management operations.
Getting Started with the Starkey Service Management Software
If this is the first time using the Service Management Software, you must go to each item on the Service Management Model in order following the arrows. To formulate and customize a service plan and to understand specifically what your Employer, Family, or Guests expect, several steps may be necessary. For some service delivery plans, all steps or information may not be required. Before scheduling time with your employer, review the process, some information may be known to you or your staff already. Be sure to obtain permission from your Employers, Family or Guests before acquiring personal information about them from others
Confidentiality Statement
Professional service providers should sign a confidentiality agreement before completing the people steps in the Service Management Software Program.
Identifying and Managing Service Expectations
To formulate and customize a service experience you must first create a mutual frame of reference by using a process and terminology designed to identify and communicate service expectations. There are five steps necessary for

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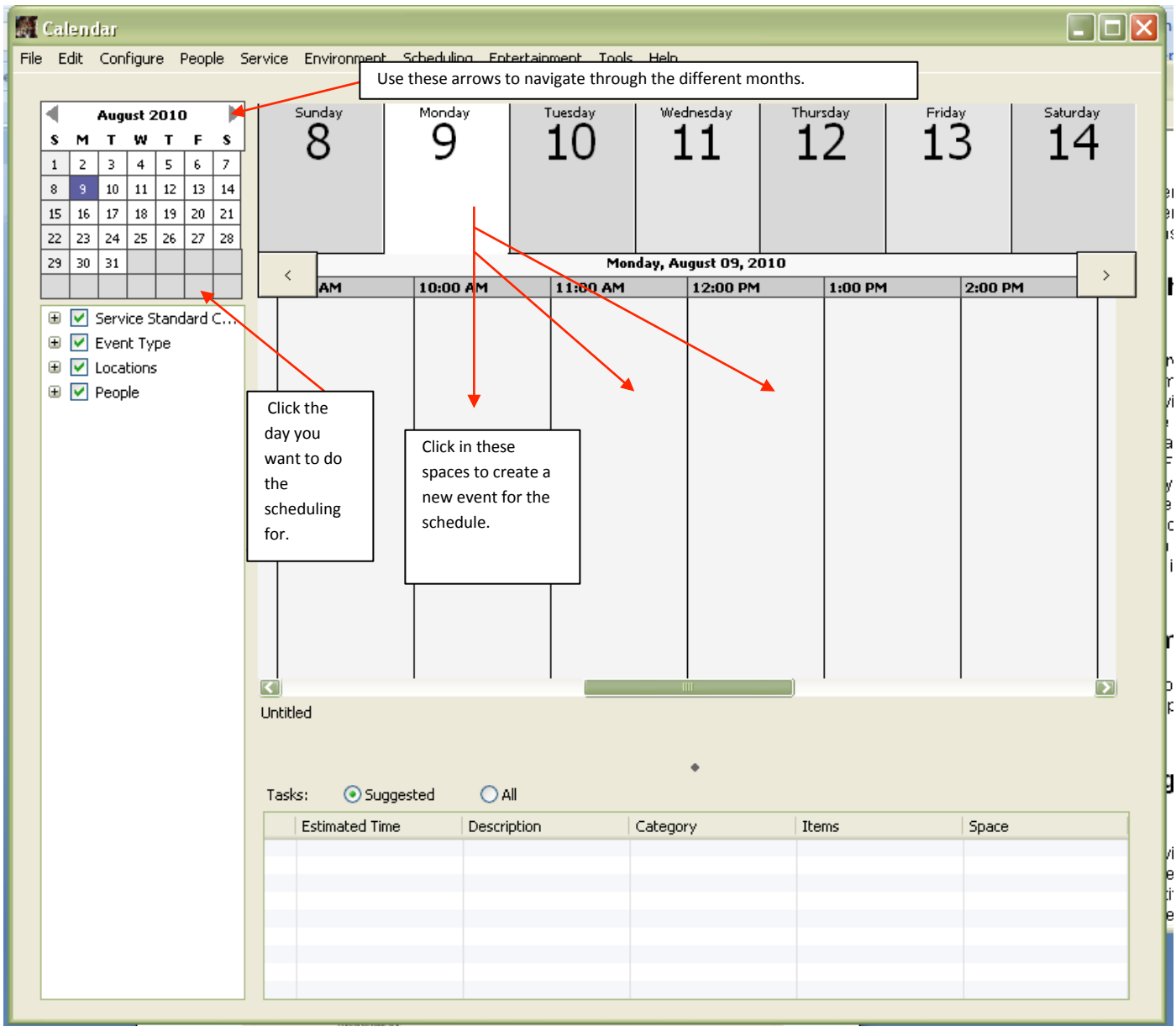
2) Calendar will appear.
3) To create a schedule or Day in the Life, click the date you want to make the schedule.
4) Click the box under the time you want to start the schedule.



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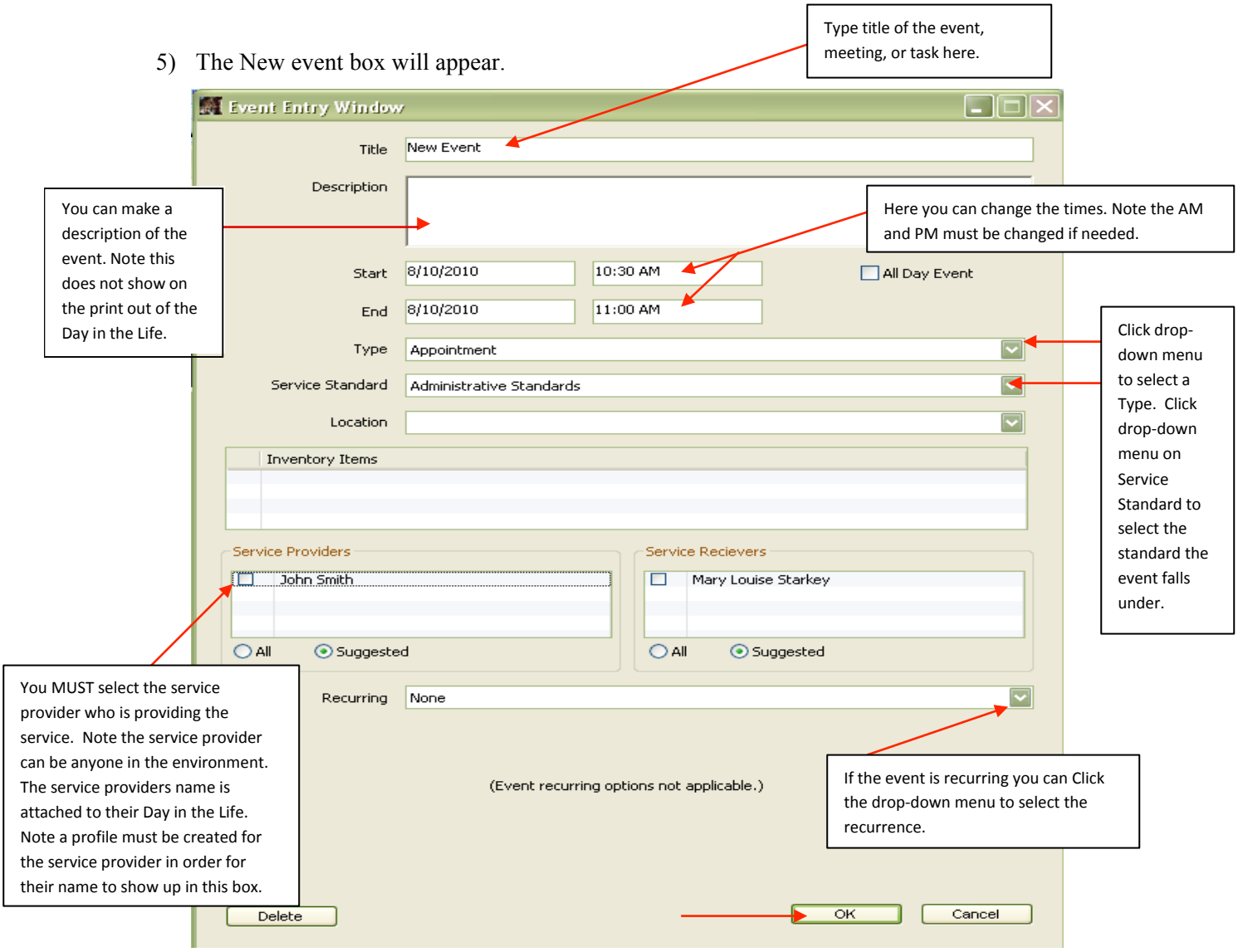
5) The New event box will appear.


Type title of the event, meeting, or task here.
Event Entry Window
Title
New Event
Description
You can make a description of the event. Note this does not show on the print out of the Day in the Life.
Here you can change the times. Note the AM and PM must be changed if needed.
Start
8/10/2010
10:30 AM
All Day Event
End
8/10/2010
11:00 AM
Type
Appointment
Click drop-down menu to select a Type. Click drop-down menu on Service Standard to select the standard the event falls under.
Service Standard
Administrative Standards
Location
Inventory Items
Service Providers
John Smith
All
Suggested
Service Recievers
Mary Louise Starkey
All
Suggested
You MUST select the service provider who is providing the service. Note the service provider can be anyone in the environment. The service providers name is attached to their Day in the Life. Note a profile must be created for the service provider in order for their name to show up in this box.
Recurring
None
(Event recurring options not applicable.)
If the event is recurring you can Click the drop-down menu to select the recurrence.
Delete
OK
Cancel

6) Follow the above text boxes to create an event.
7) Once finished, click **OK** to save.

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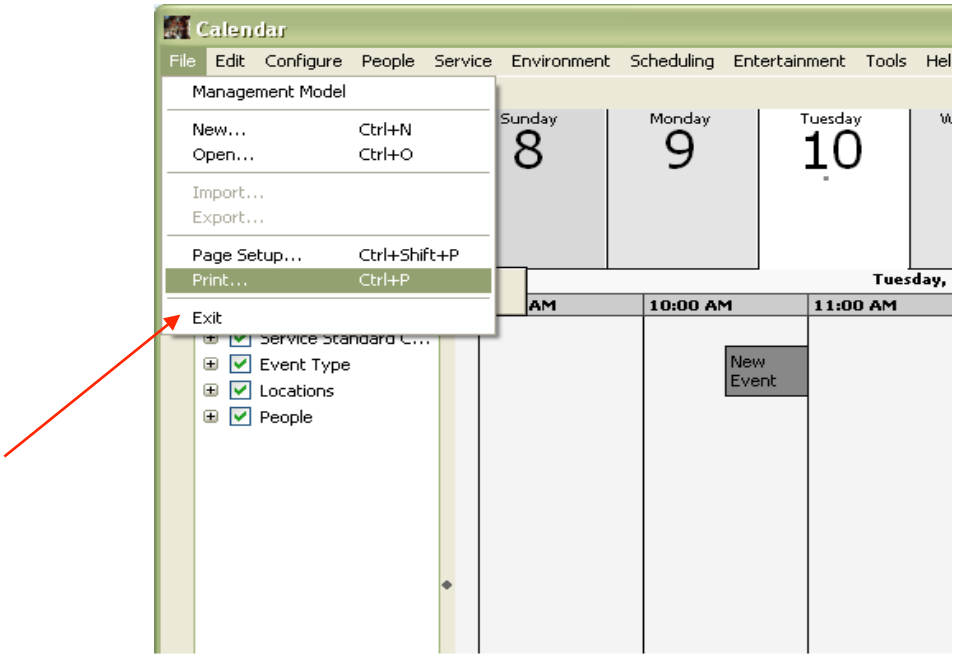
8) When you are ready to print a schedule you have created:

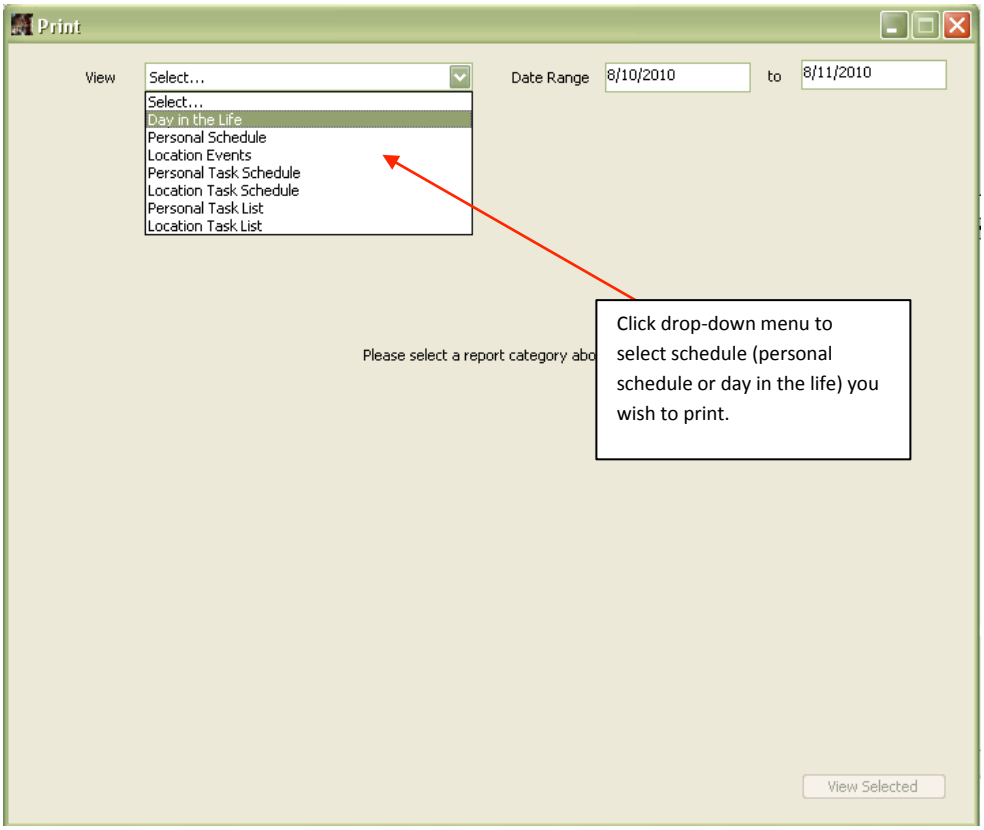
a. Go to your calendar and click the date you want to print.

b. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK**.

c. From the menu, click **File** / **Print**.



d. A print screen will appear. Click the drop-down menu next to **View** at the top of the print screen. Click the schedule you wish to print.



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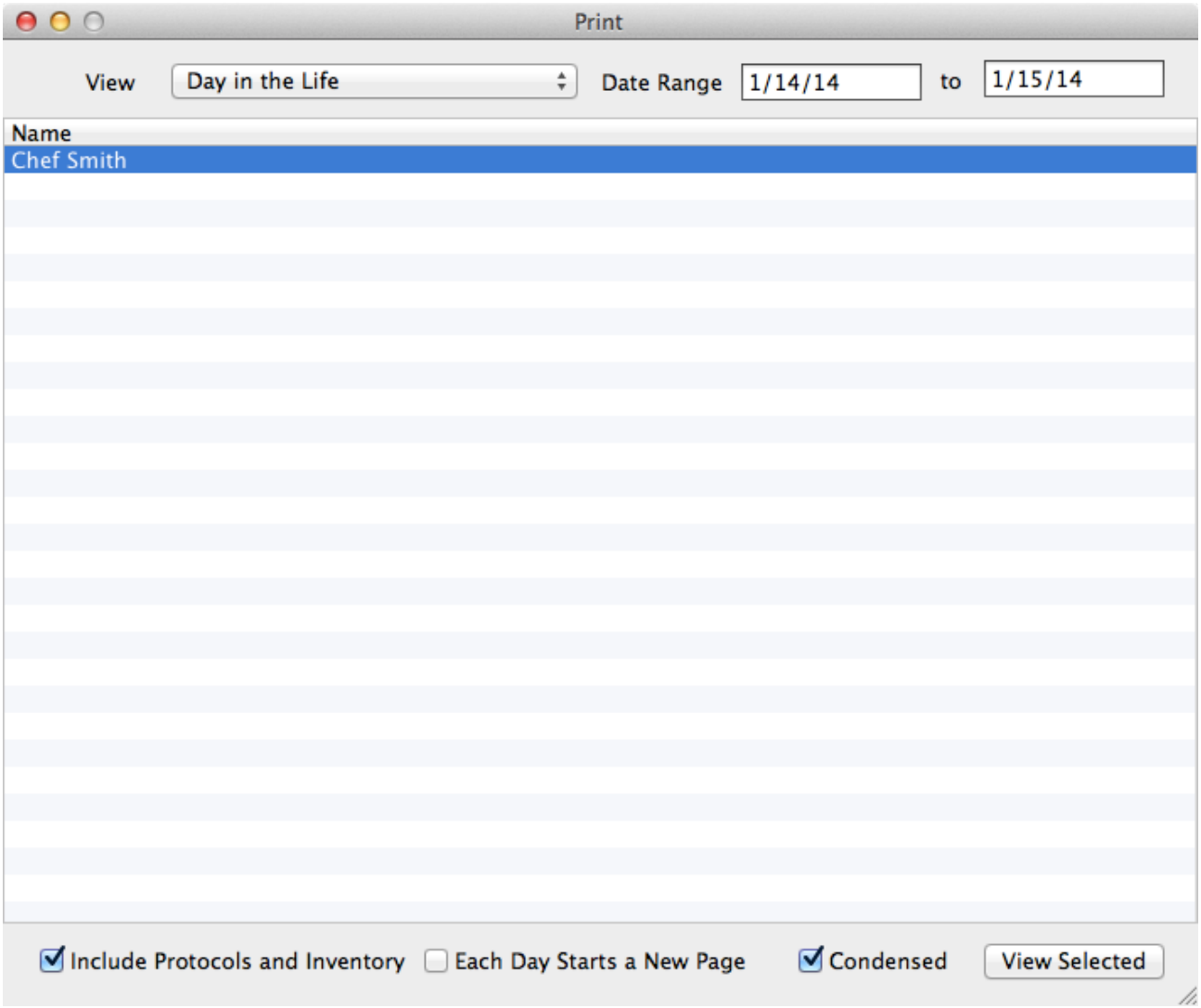
e. A list of service providers and receivers will appear. Highlight the individual you wish to print the schedule for.

f. Confirm you have the correct **Date Range** for the day you have selected. The date range is from the day you want to the next day. For example if you want to print a schedule for 1/14/14 the date range MUST read 1/14/14 to 1/15/14.

g. Click Include Protocols and Inventory if needed.

h. Click Each Day Starts a New Page if you are printing multiple days, and need each day to start on a new page.

i. Click Condensed if you are printing multiple days and do not need each day on a new page.



j. Click **View Selected** to preview the report

k. A print screen will appear for you to preview what the schedule will look like on paper.

l. In the upper right hand corner click **Print**.

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m. The computer print screen will appear.
n. Select the printer you would like it to print from.
o. Click **Print**.

YOU SHOULD NOW HAVE A PRINTED SCHEDULE OR DAY IN THE LIFE

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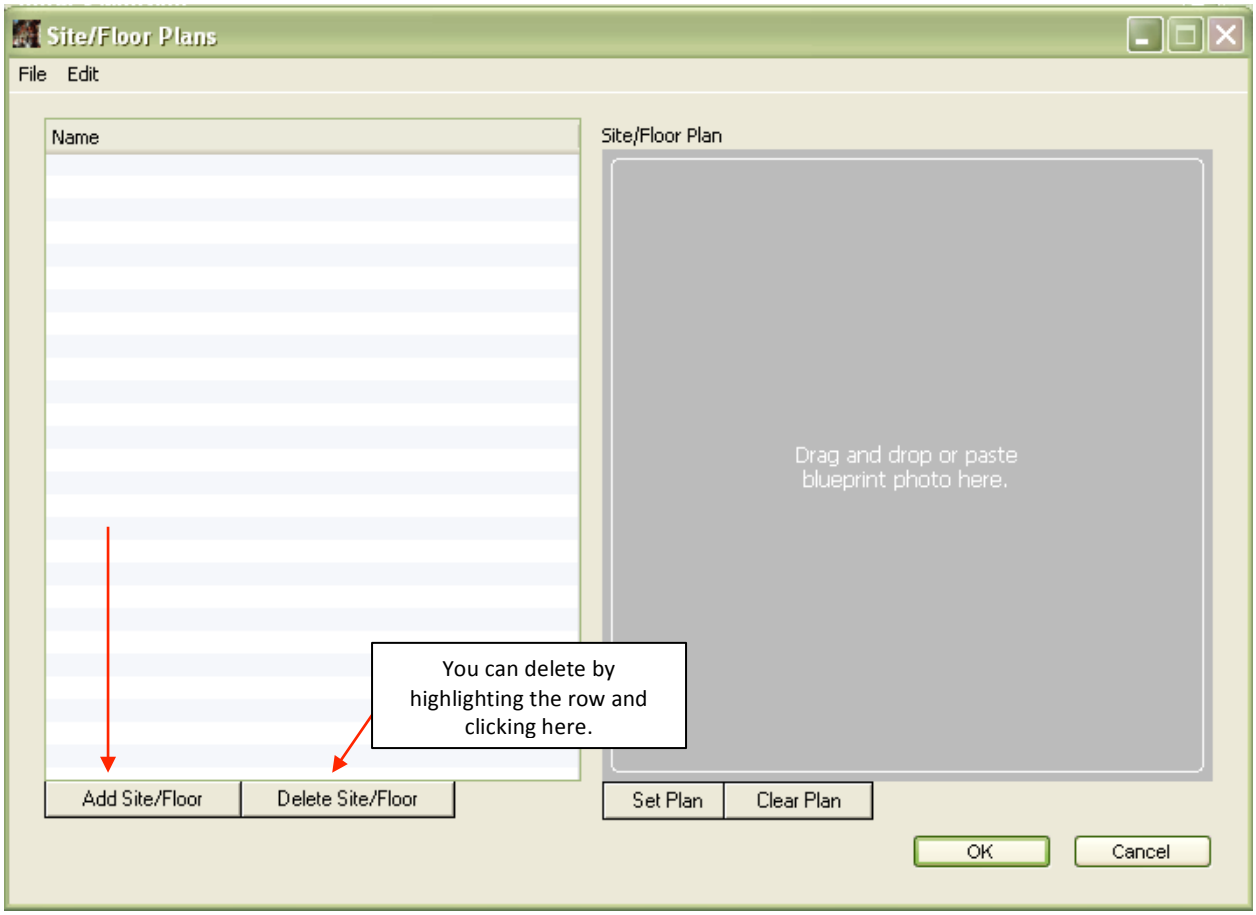
Section 6: The Environment

We have now moved on to the right column in the Service Management Model: the Environment. For this next section you need a copy of the blueprints for the home you are creating on your computer in an image form.

Adding Sites/Floors

1) Start by adding the Sites/Floors for the house.
2) From the main menu, click **Environment** / **Sites/Floors**.
3) The Site/Floor Plans screen will appear.
4) Click **Add Site/Floor**.
5) Type the name of you main house, for example "Starkey Mansion" then press enter on your computer keyboard.
6) Click **Add Site/Floor**.
7) Type 1st floor, press enter on your computer keyboard.
8) Click **Add Site/Floor**.
9) Type 2nd floor, press enter on your computer keyboard.
10) Repeat: Click **Add Site/Floor** in between adding each and all floors in the home.



Adding Floor Plans / Blueprints

If you do not have the blueprints, you can add them at a later time. It is important to add the blueprints once you have them, so you can use the software to zone.

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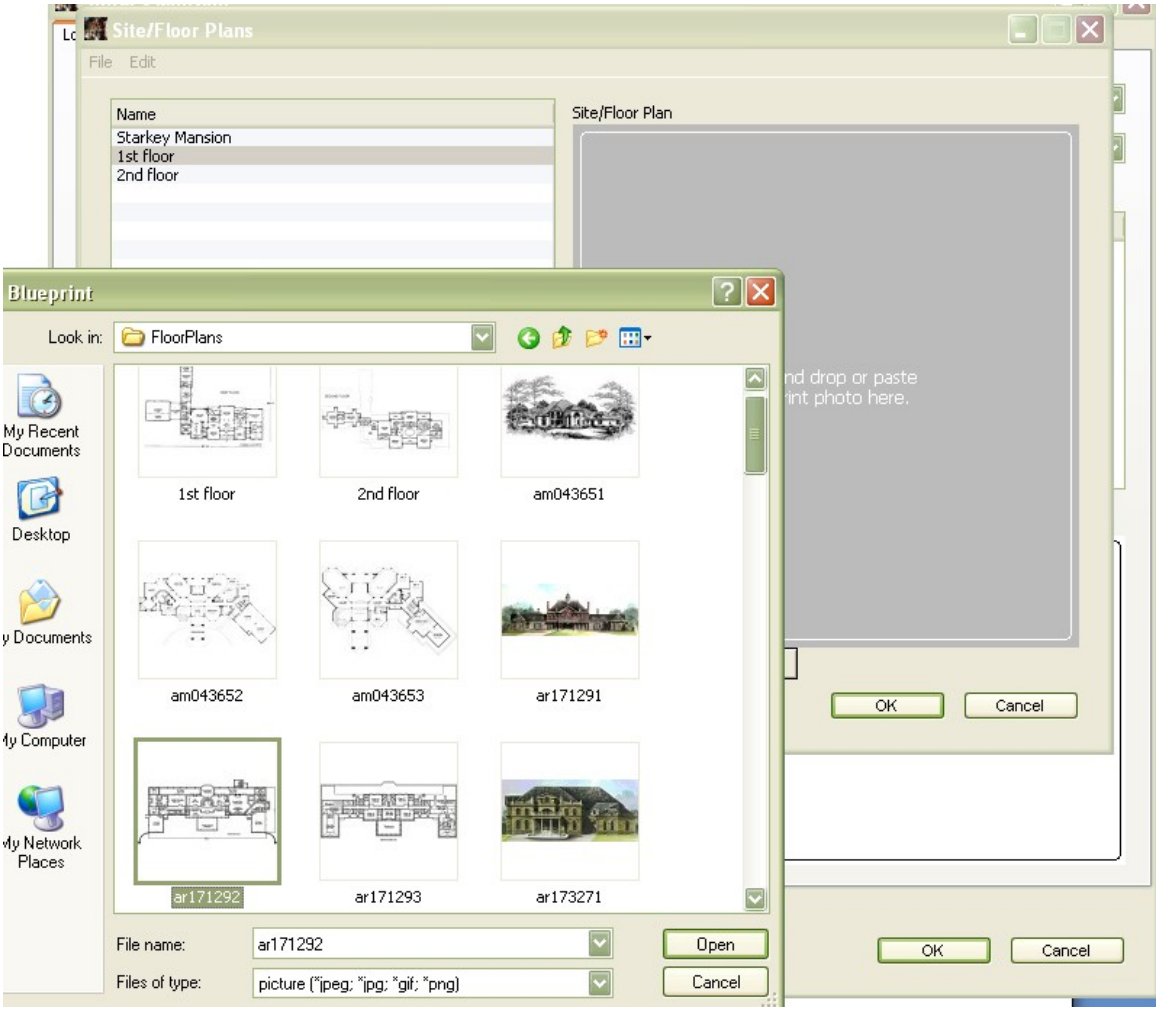
1) Highlight the 1st floor and click **Set Plan**.
2) The computer Set Blueprint screen will appear.
3) Navigate to where you saved your digital copies of the blueprints.
4) Drag the first floor blueprints into the box labeled "Drag and drop or paste blueprint photo here."
5) Click **Cancel** in the bottom right hand corner of the Set Blueprint screen once you have dragged the blueprint.
6) Repeat steps above for all other floors. You do not need a blueprint floor plan for the main house. You only need blueprints for the floors.



7) Once you have added all the blueprints to the floors, click **OK** in the bottom right hand corner of the Site/Floor screen. Here is an example of a completed list:

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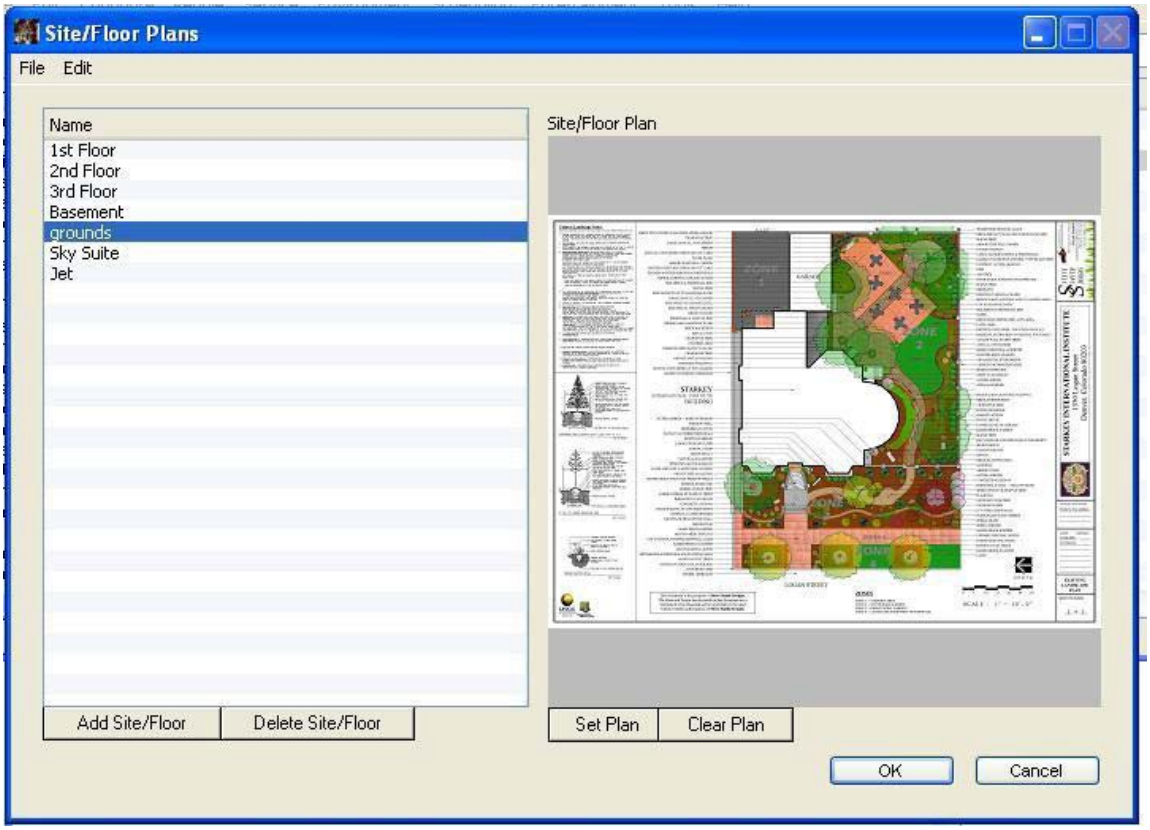

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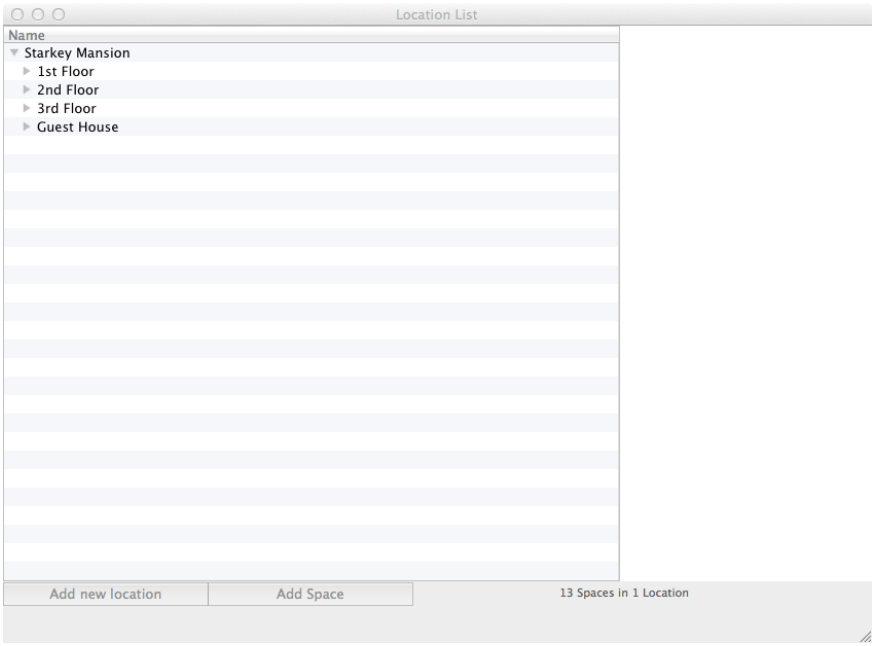
Adding Locations

When setting up an environment, first create the estate as the top-level location and then add properties such as home, guest house, etc. under that estate. Follow the steps here.

1) From the main Service Management Model page, click **Physical Structure** under the Environment column, or click **Environment** / **Locations** from the main menu.
2) The **Locations** screen will appear. You will now begin to add your locations.

Note: Make sure before you begin you understand the hierarchy of the home. The first location you want to add is the overall home or the estate. For example, you would start with "Starkey Mansion" as your first location. You can do this by clicking **Add new location** at the bottom left hand corner. After that you can add the sub-properties under the estate such as home, guest house, and so on.



3) Click **Add new location**.
4) The **Physical Space Entry Window** will appear. There are two tabs for location profiles: **Location** and **Area**.

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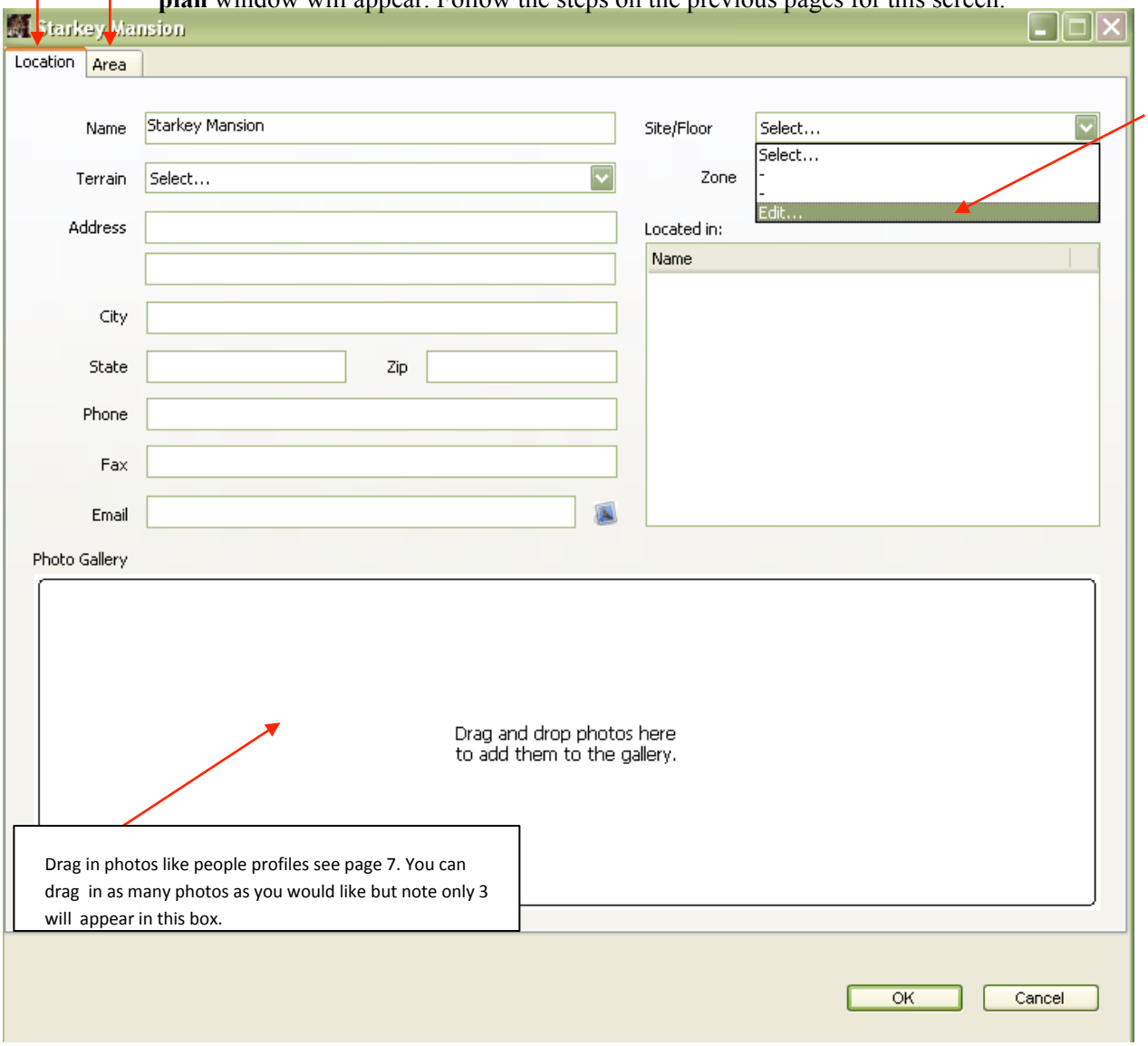
a. Under the **Location** tab you will fill out generic information about the property.
b. Under the **Area** tab you will fill out information about the surrounding areas of the home including: acreage, climate, urban access, community affiliation, surrounding area, service flow challenges, utilities, and emergency contact information.
c. If you see this symbol + you must click it to fill in the fields.
d. Start with the location tab by filling in all fields on the left side of the screen. You can also drag photos into the profile the same way you did with people profiles.
e. When moving to the right side of the Location tab, click the **Site/Floor** drop-down list and select one of the site/floors set up previously. Select the Site or Floor which corresponds with the location you are creating. For example, if we are creating the location Starkey Mansion we would select the Site/Floor "Starkey Mansion." If we are creating location 1st floor we would select the Site/Floor "1st Floor." If we are creating location master bathroom we would select the floor it is located on.
f. If you need to add or delete sites/floors, click **Edit** in the drop-down list and the **Site/Floor plan** window will appear. Follow the steps on the previous pages for this screen.



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Notes:

- You only need to fill out the location tab and area tab information once. However you can add photos to as many location profiles as you would like. You will always have to select a Site/Floor for every location.
- Do not worry about the zoning drop-down menu at this time we will cover that later in the manual.
- Once you are ready to navigate away from this page click **OK** in bottom right corner to save. The location list screen will appear.

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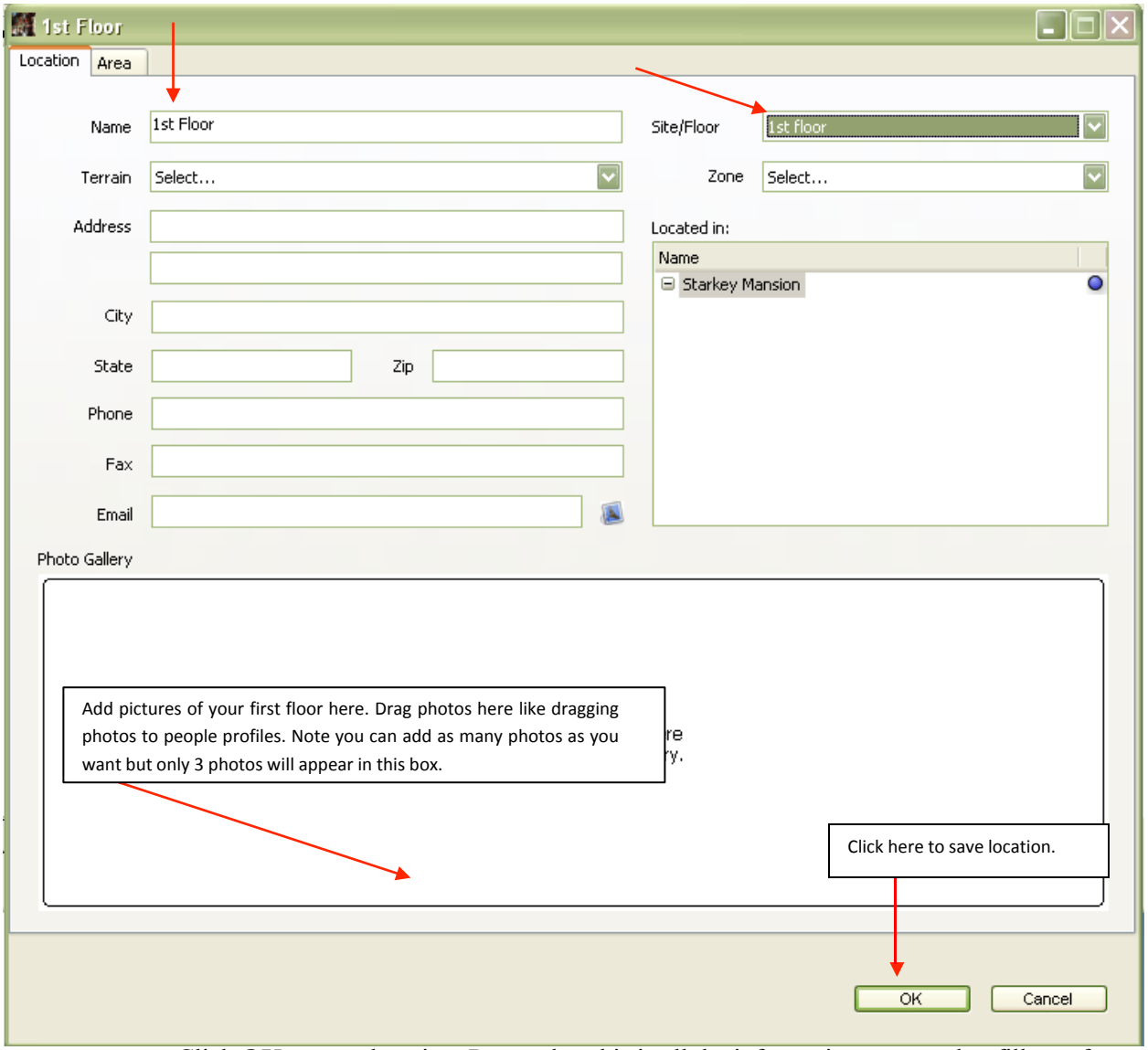
Create Floors and Rooms

1) By now you should have created the main house location profile. You are now ready to create floors and rooms in your location list.
    a. Click the main house location name.
        i. You will see at the bottom left corner the box change from **Add Space** to **Add to Starkey Mansion**.
    b. Click **Add to Starkey Mansion**.
    c. A new location profile will appear.
    d. Type into the Name field 1st Floor and select "1st floor" for the Site/Floor.
    e. Note: Site/Floor selection is REQUIRED. The software will not allow you to continue in Locations if you do not select a site/floor**.**
    f. Add pictures if you would like by dragging them into the software. See page 7.



    g. Click **OK** to save location. Remember this is all the information you need to fill out for each location under the main home.

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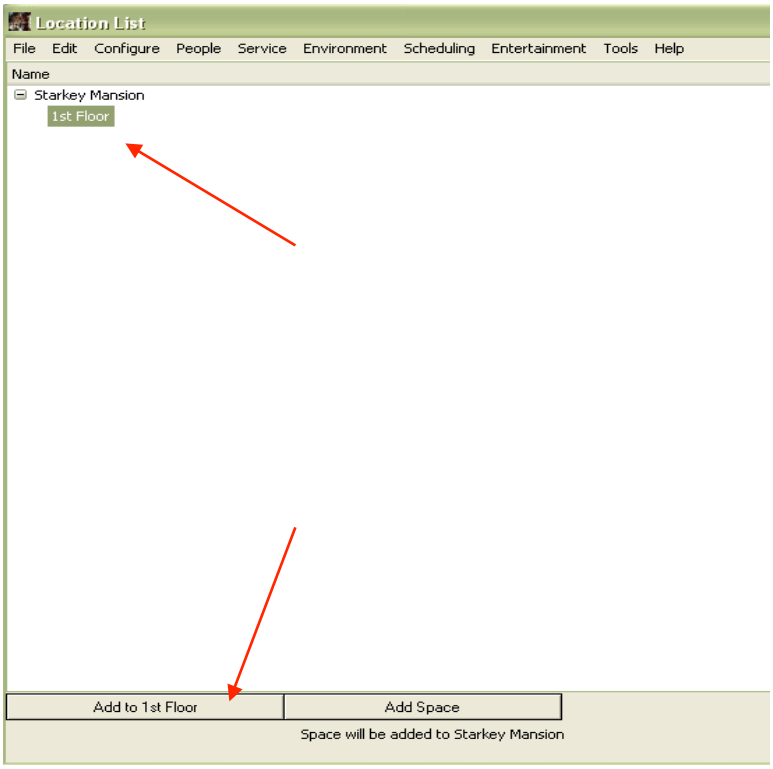
2) The location list screen will appear.
    a. Click 1st floor.
        i. Notice the box in the lower left hand corner changes to **Add to 1st Floor**.
    b. You are now ready to add each room located on the first floor to your location list.
    c. Click **Add to 1st Floor**.



    d. If your property has many structures on it like a guest house, pool house, stables, etc., click **Add Space** to add the structure like you added the first structure. To add floors and rooms to these structures, follow the instructions for "Create Floors and Rooms" above.

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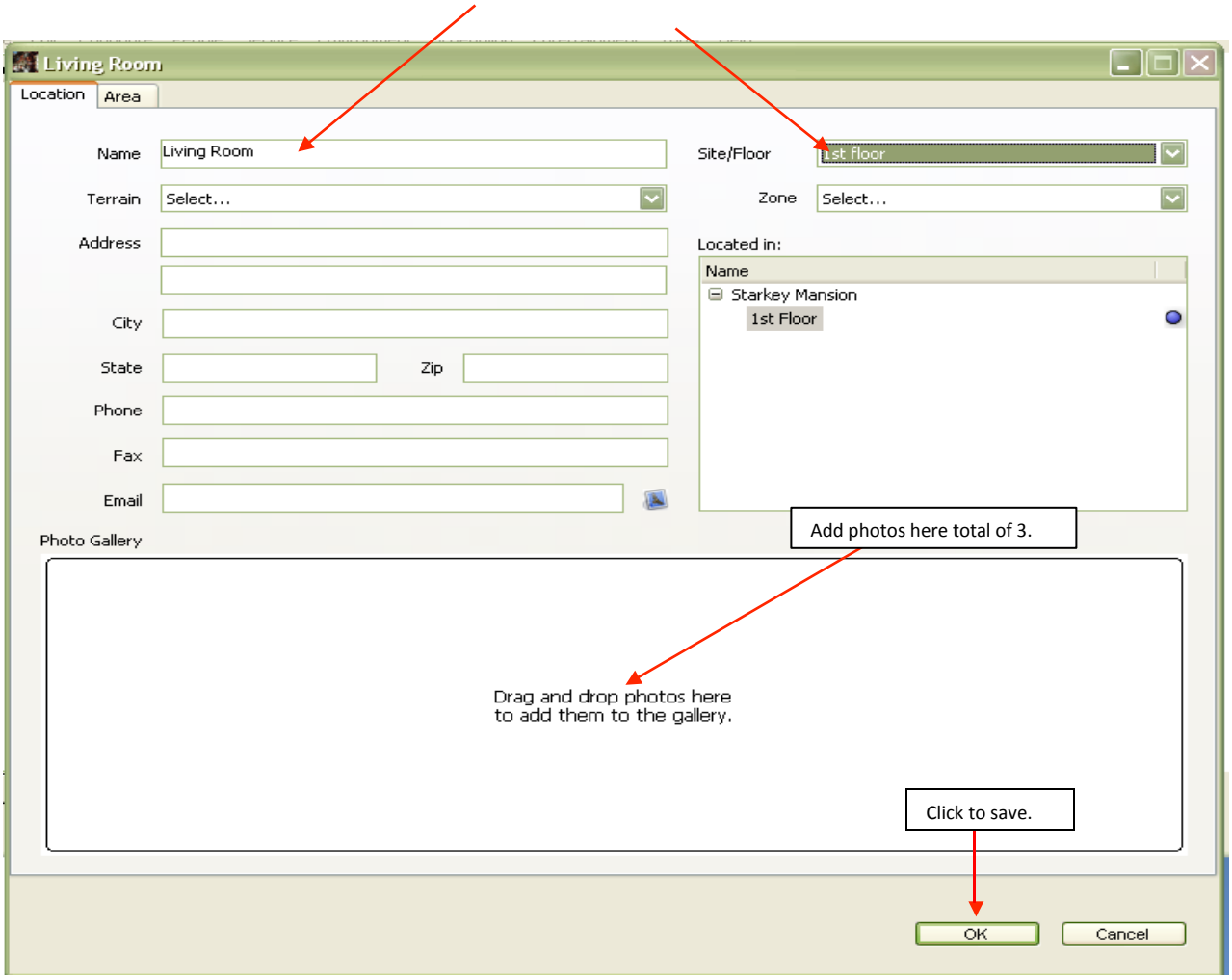
3) A physical space entry window screen will appear.
   a. In the name field, type the name of the first room you want to add. For example, if you have a living room on your first floor, type "Living Room".
   b. Select the Site/Floor to be "1st floor"
   c. Drag in images of what the living room looks like.
   d. Click **OK** to save.



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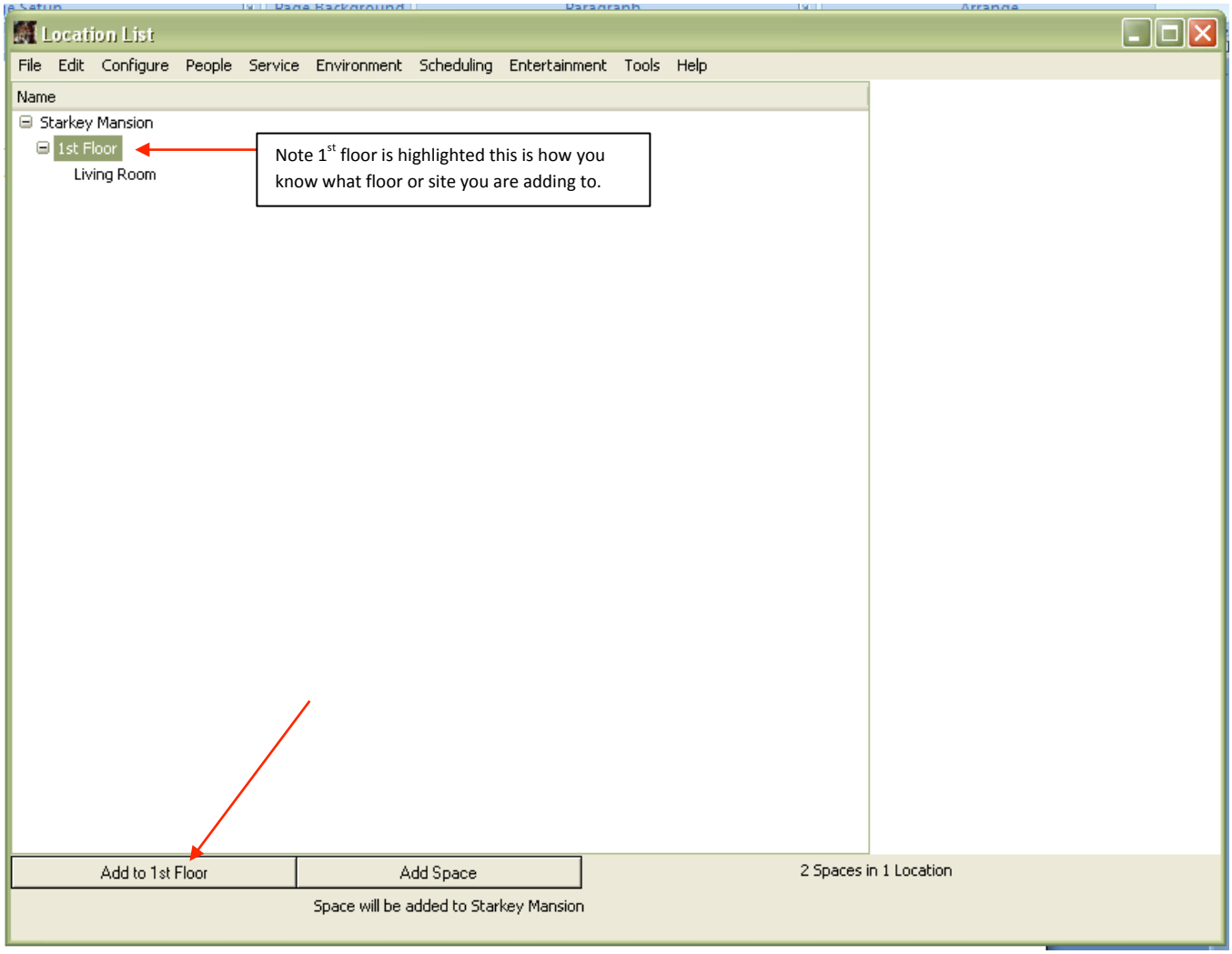
4) The Location List screen will appear.
    a. Click **1st Floor**.
        i. Notice the box in the lower left hand corner changes to **Add to 1st Floor**.
    b. Click **Add to 1st Floor**.


Location List
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
Name
Starkey Mansion
1st Floor
Living Room
Note 1st floor is highlighted this is how you know what floor or site you are adding to.
Add to 1st Floor
Add Space
2 Spaces in 1 Location
Space will be added to Starkey Mansion

5) A location profile screen will appear
    a. Type the name of the room you are creating in the name field.
    b. In Site/Floor menu select "1st floor"
    c. Add photos if you would like
    d. Click **OK** to save the location.
6) You MUST flow these steps for **every room** on each floor. This will become very important when you zone the property.
7) To add another floor to your property, click your main house or in the example above "Starkey Mansion".
    a. Then click **Add to Starkey Mansion** or your home's name.
    b. The Physical Space Entry window will appear and you can add your new floor to the name field and select your site/floor it is on.
8) To add a new room to a floor, follow the steps for adding to the first floor but using the new floor instead of the first floor.

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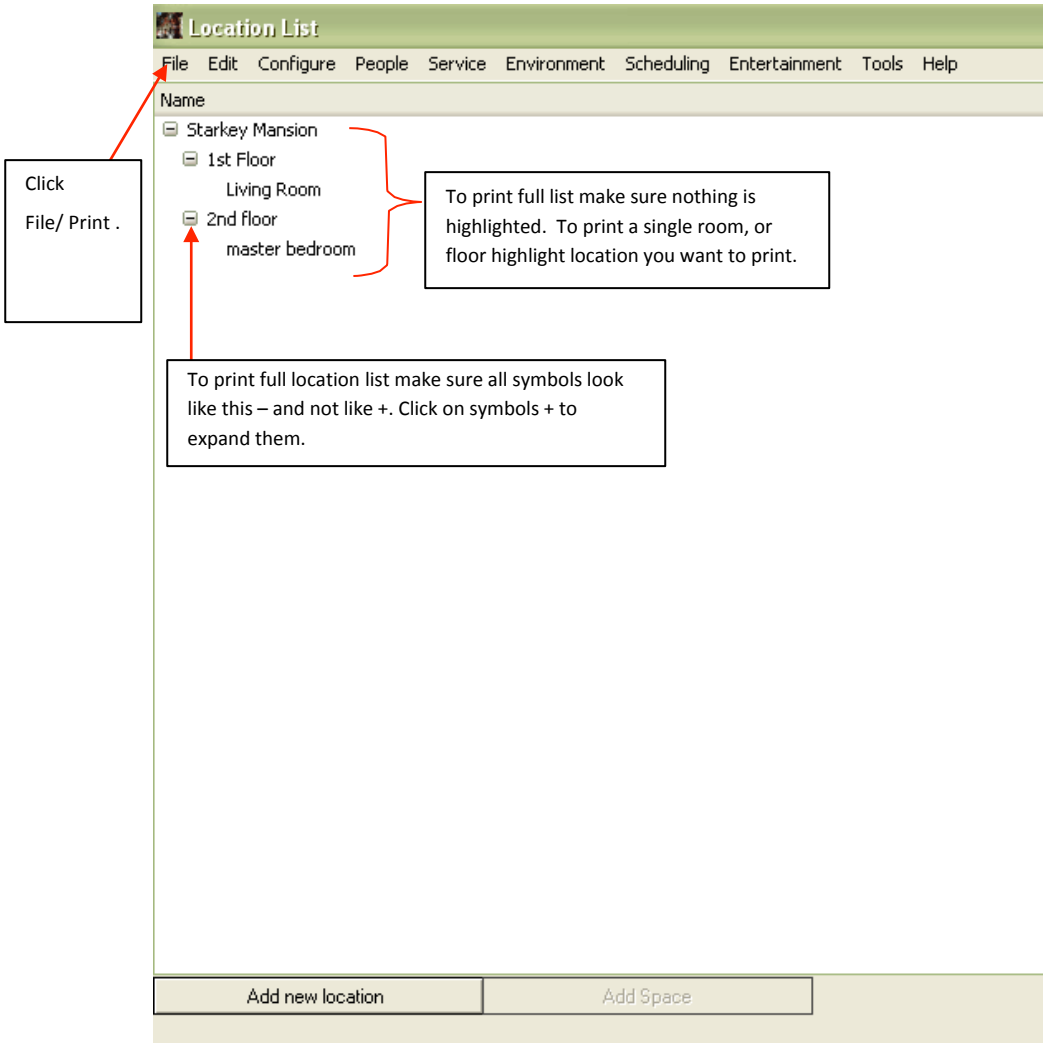
9) When you have completed all your floors and added all your rooms on each floor you are ready to print.
    a. When you print the full location list the printer may be slow printing the pictures.
10) Navigate back to the location list. If you have left the software, open it up and click **Physical Structure** on the Management Model, or **Environment** / **Locations** from the main menu.
11) The **Location List** will appear.


Location List
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
Name
Starkey Mansion
1st Floor
Living Room
2nd floor
master bedroom
Click
File/ Print .
To print full list make sure nothing is highlighted. To print a single room, or floor highlight location you want to print.
To print full location list make sure all symbols look like this – and not like +. Click on symbols + to expand them.
Add new location
Add Space

12) For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK**
13) Click **File** / **Print**.
14) The program will ask you if you want to print all locations. Click **Print All** to print all or click **Cancel** to highlight the location you want to print.
15) The program will ask you if you would like to print the pictures. Select the answer you would like.
16) A print screen will appear showing how the Locations Report will look on paper.
17) Click **Print** in upper right hand corner.
18) This can be a very large set of documents. Allow enough time to print.

YOU SHOULD NOW HAVE A PRINTED LOCATIONS LIST

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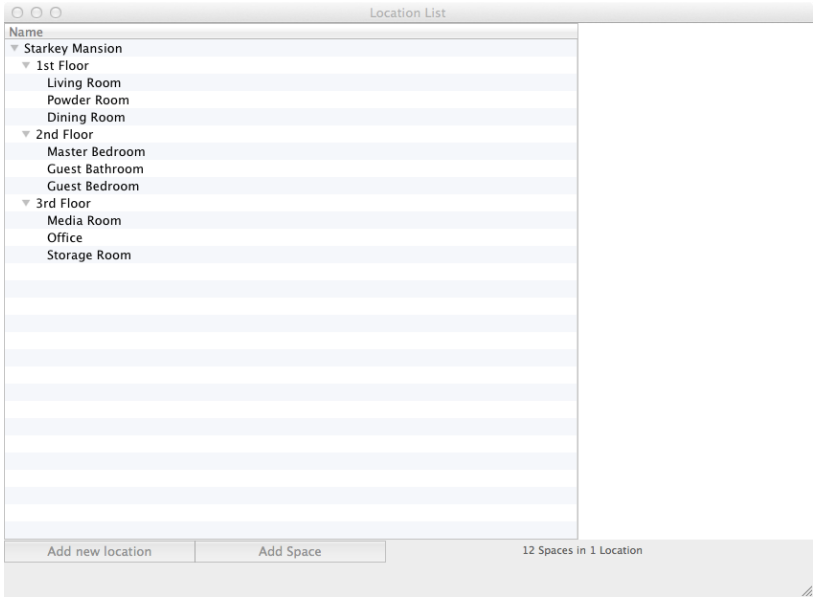
Change the Order of the Locations list

You can click and drag locations to reorder them in the list.

- **Reorder within the same level**: To reorder the list and keep the locations you are moving at the same level, click and drag the location **down**. A black horizontal line appears. When the line appears where you want the location, drop it.

  For example, in the Location list below, to reorder the locations on the 1st Floor, click Living Room and drag it down until the black line appears where you want it (either under Powder Room or under Dining Room). Then drop it.

  NOTE: Always drag locations **DOWN** in the list to reorder them at the same level. If you drag an element to the top of the list at the same level, it will not be moved.



- **Reorder within the same level and create a new sub-level**: In this example, you want to move the Guest Bathroom under the Guest Bedroom on the 2nd floor. If you just click and drag it down, it will stay at the same level as the Guest Bedroom, as we learned in the example above.

  To create a sub-level under the Guest Bedroom: Click and drag the Guest Bathroom down until you see the black horizontal line appear under the Guest Bedroom. Press and hold the SHIFT key on your keyboard. Drop the location and let go of the Shift key. Guest Bathroom now appears as s sub-level under Guest Bedroom.

- **Reorder to a different level:** In this example, you want to move the Office location to the 1st Floor at the same level as the Living Room, Powder Room, and Dining Room. Click and drag Office until you see a black horizontal line appear directly under 1st Floor. Drop it there. Office is placed at the same level as the other 1st Floor locations, at the bottom of the list.

- **Reorder to a different level and create a new sub-level**: In this example, you want to move the Media Room location to appear under the Living Room on the 1st Floor. Click and drag Media Room until you see a black horizontal line under Living Room. Drop it there. Media Room is placed under the Living Room location.

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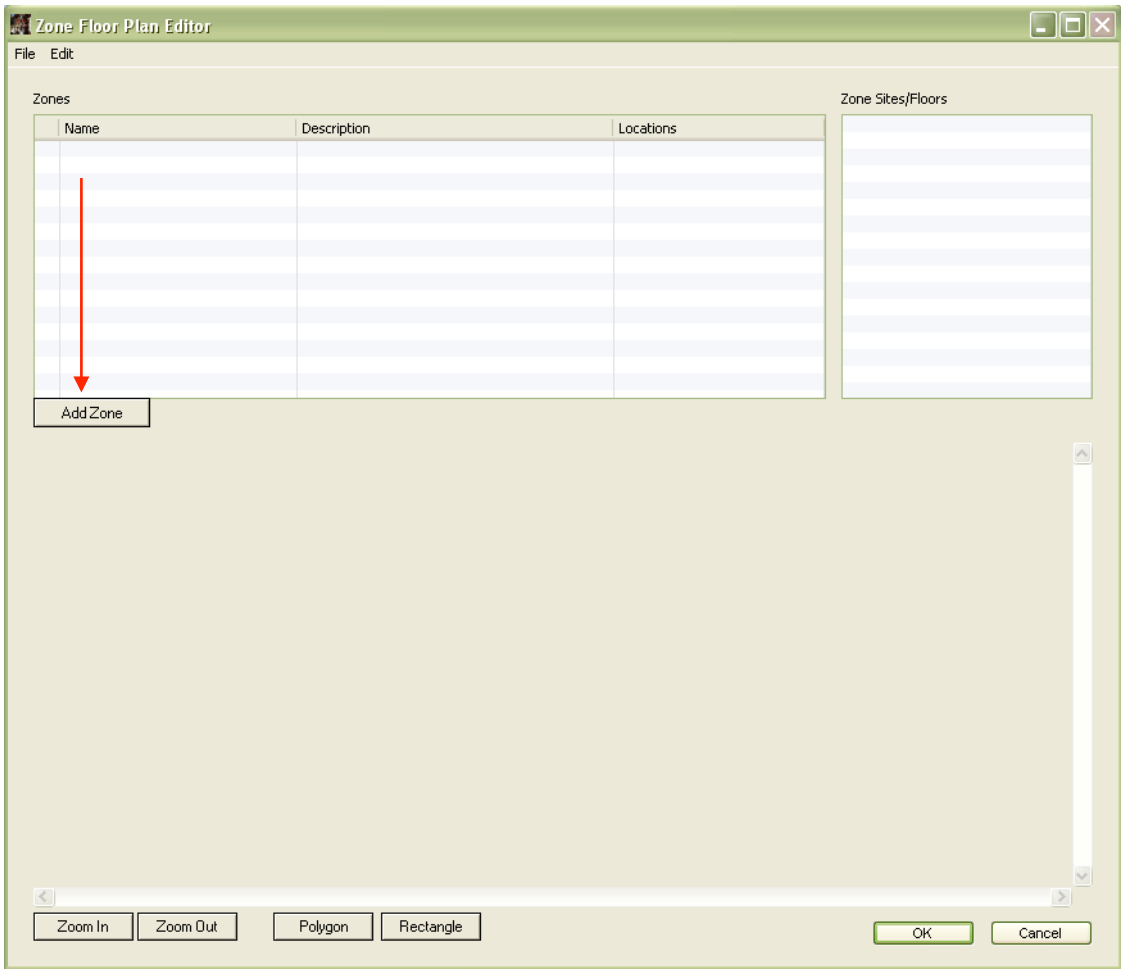
Section 7: Zoning

Now you have created a locations list for your home. The next step is to zone the home. Zoning is the process of designating areas of function within the Physical Structure and Service Environment. Zoning delineates the physical areas around which to plan the timing and location of technical duties in a Service Delivery system. In the Starkey Software you are able to electronically zone the home with the blueprints you have put into the software.

Prior to starting the zoning process think about how you want to zone. Ask yourself what rooms should be put together. Remember, it takes approximately 4 hours to clean 2,000 square feet. Think about how often certain rooms are used. Consider how you want to name your zones. You will be naming later.

1) Start on the main Service Management Model screen.
2) Click **Service Flow & Zoning** box in the Environment column. Or click **Environment** / **Zones** from the main menu
3) The **Zone Floor Plan Editor** screen will appear.



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4) Click **Add Zone** in the lower left.
5) The **Zone Entry** window will appear.
6) Enter the **Name** of the zone you are creating.
    a. For example you can call the zone “Zone 1” “Zone A” “Zone1-1st Floor” etc.
7) You may add a description of the zone in the **Description** field.
8) To add your rooms for this zone look at the **Included Locations** box.
    a. Click the + symbol next to the main house.
    b. The + symbol will turn into – symbol and the floors of your house will appear with the + symbols next to each floor.
    c. Click the + symbol next to the floor you are zoning.
    d. The + symbol will turn into – symbol and all the rooms you added will appear.
    e. Next to each room is a box that you can check.
    f. Click each box you want to add to the zone.
    g. Click **OK** when you have added all the rooms to the zone.

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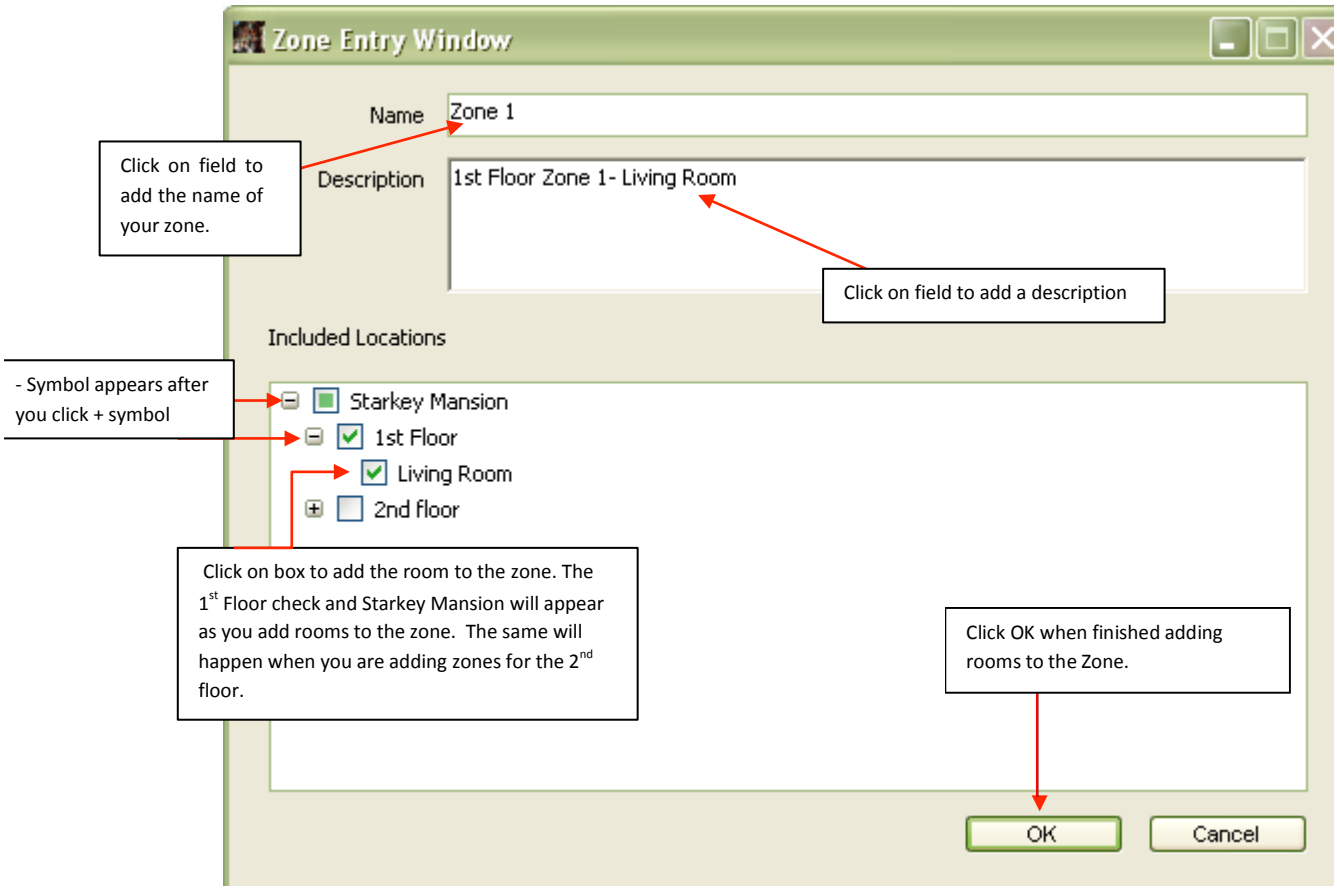
Zone Entry Window
Name
Zone 1
Description
1st Floor Zone 1- Living Room
Click on field to add the name of your zone.
Click on field to add a description
Included Locations
- Symbol appears after you click + symbol
Starkey Mansion
1st Floor
Living Room
2nd floor
Click on box to add the room to the zone. The 1st Floor check and Starkey Mansion will appear as you add rooms to the zone. The same will happen when you are adding zones for the 2nd floor.
Click OK when finished adding rooms to the Zone.
OK
Cancel

9) Click **OK** and **Zoning Floor Plan Editor** will appear with the zone added to the list.
   a. The software will automatically display the picture of the floor you are zoning from your location list you created earlier.

Note: If the blueprint or plan does not display once you have selected a location for the zone (as shown on the next screen shot) this mean that your site/floor plan area does not have the blueprint correctly added. It could also mean you picked the incorrect site/floor plan in your location. Check your location areas and site/floor area to make sure they are correct.

See screen shot on next page.

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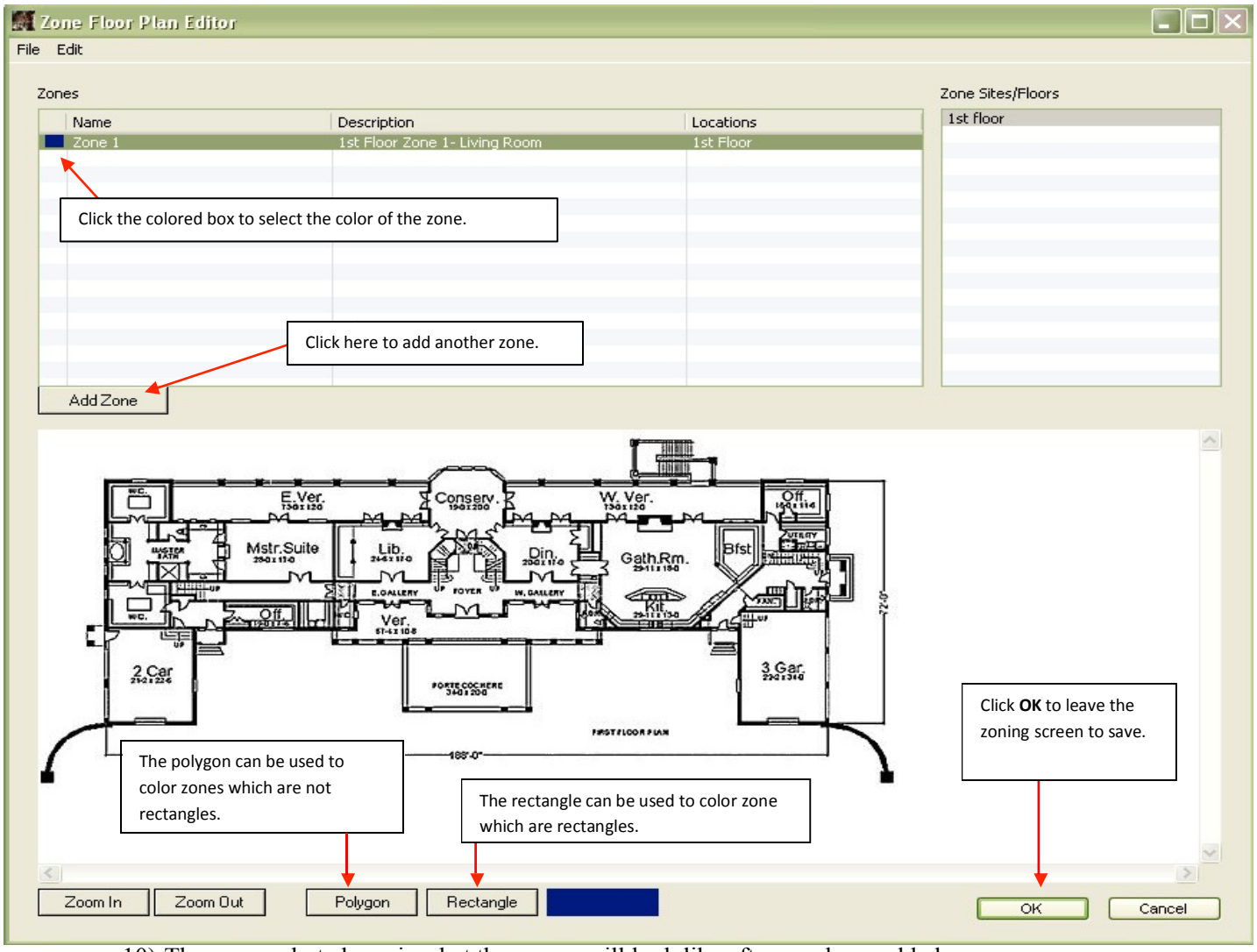

10) The screen shot above is what the screen will look like after you have added a zone.
11) You can select a color you would like to color the zone by clicking the colored box in the left hand corner next to the name of the zone.
12) Once you have selected the color you are ready to color the zone on the blueprint.
13) Start by looking at the zone you are about to color.
    a. Is it rectangular?
        i. If yes, use the rectangle zone tool.
        ii. If no, use the polygon tool.
    b. You can also use a combination of both to color the zone.
14) The following screen shots will show you how to color a zone step by step.
15) If you would like to zoom in to see the blueprints better you can click **Zoom In**. To zoom out click **Zoom Out**.

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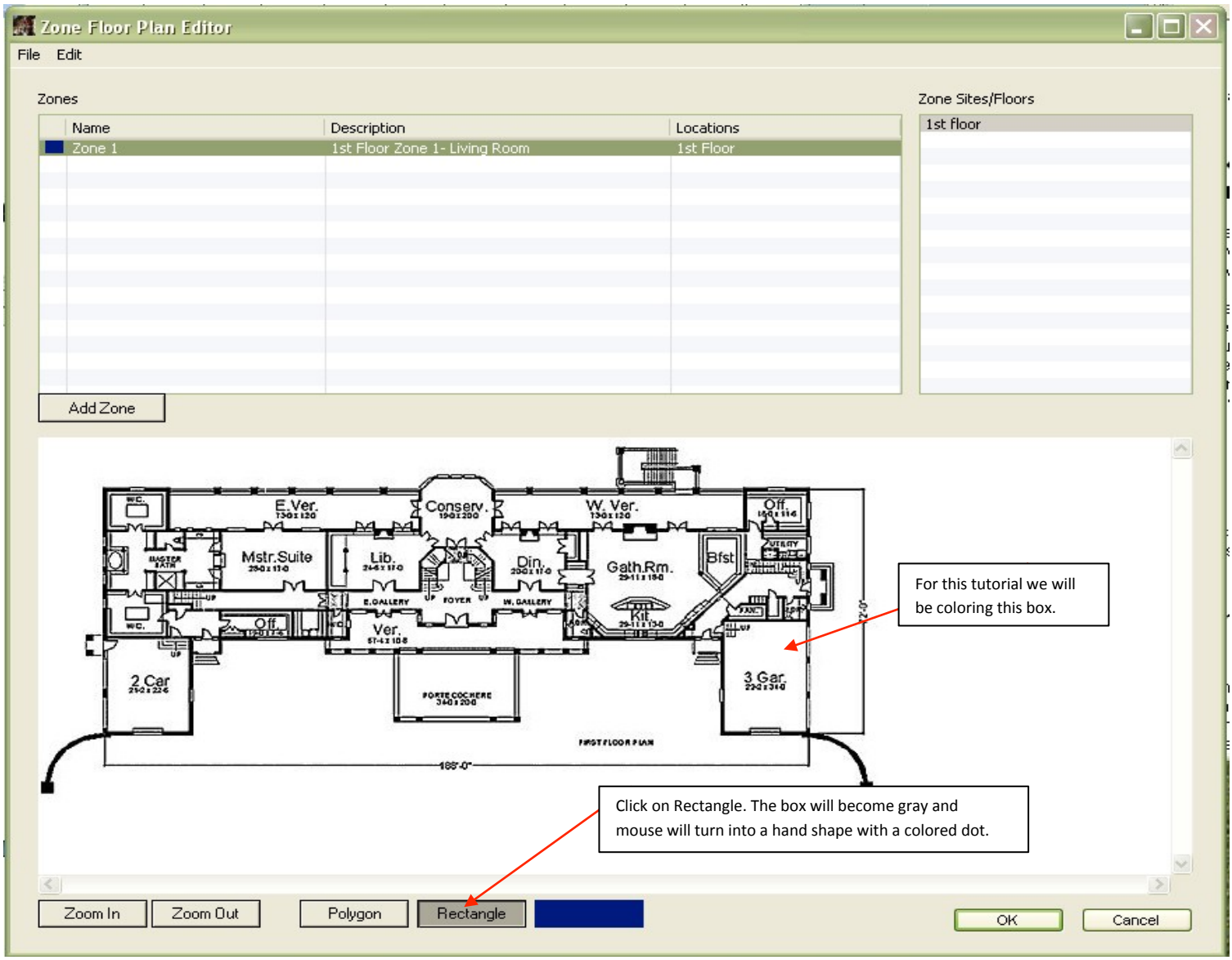

16) We want to color the 3-car garage on the right hand side of the blueprint and it is part of the zone we are coloring.
17) It is a rectangular shape therefore we will click **Rectangle** at the bottom of the screen.
18) The box will turn a gray color, and the mouse will turn into a hand with a finger pointed with a colored dot.

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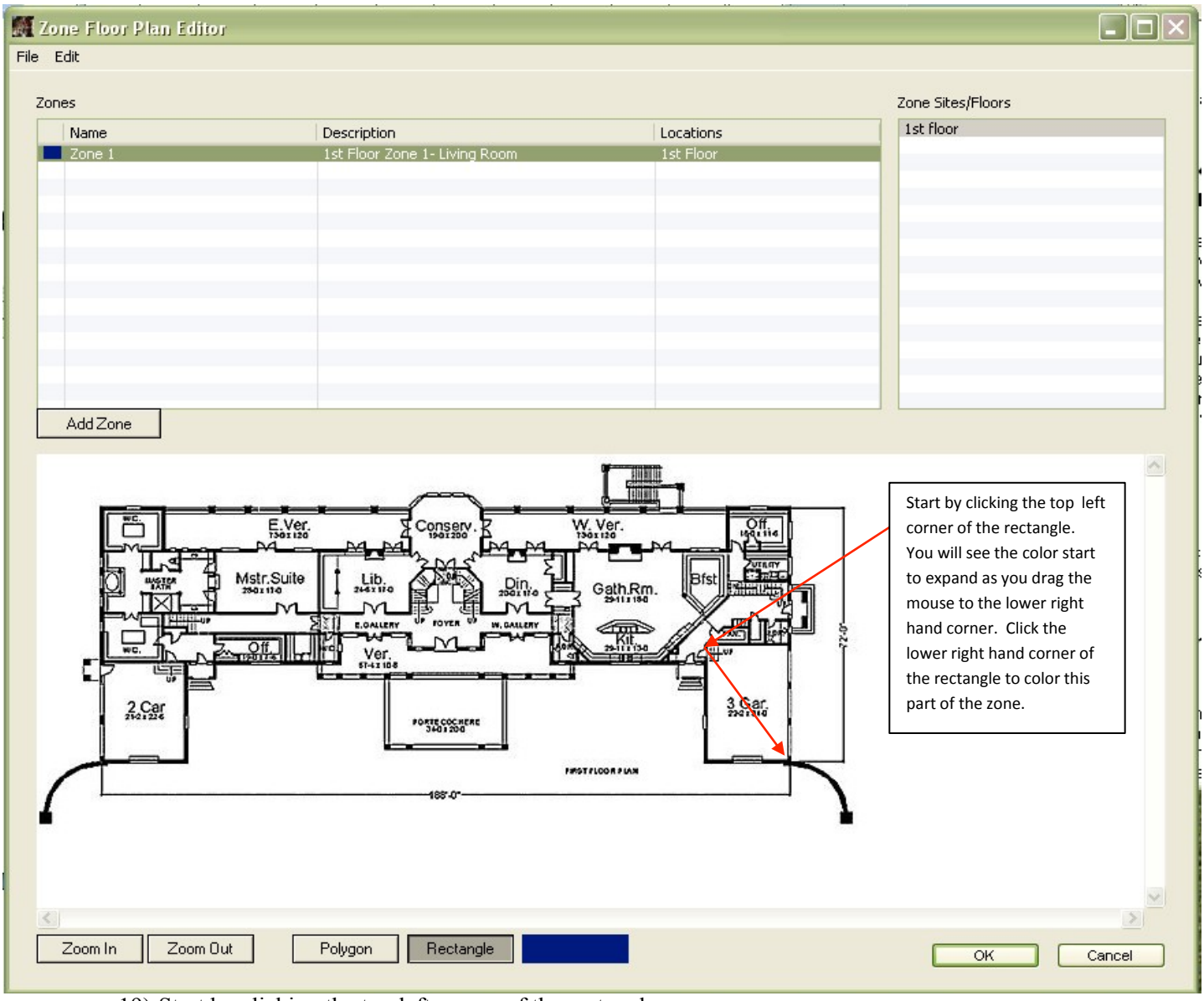

19) Start by clicking the top left corner of the rectangle.
20) You will see the color start to expand as you drag the mouse to the lower right hand corner.
21) Click the lower right hand corner of the rectangle to color this part of the zone.
    a. You can also do this in the opposite direction by first clicking the upper right hand corner and dragging the mouse to and clicking the lower left hand corner.
22) To delete a colored area of a zone:
    a. Click the colored area you wish to delete.
    b. You will see four dots in each corner appear.
    c. Press **Delete** on your computer keyboard.

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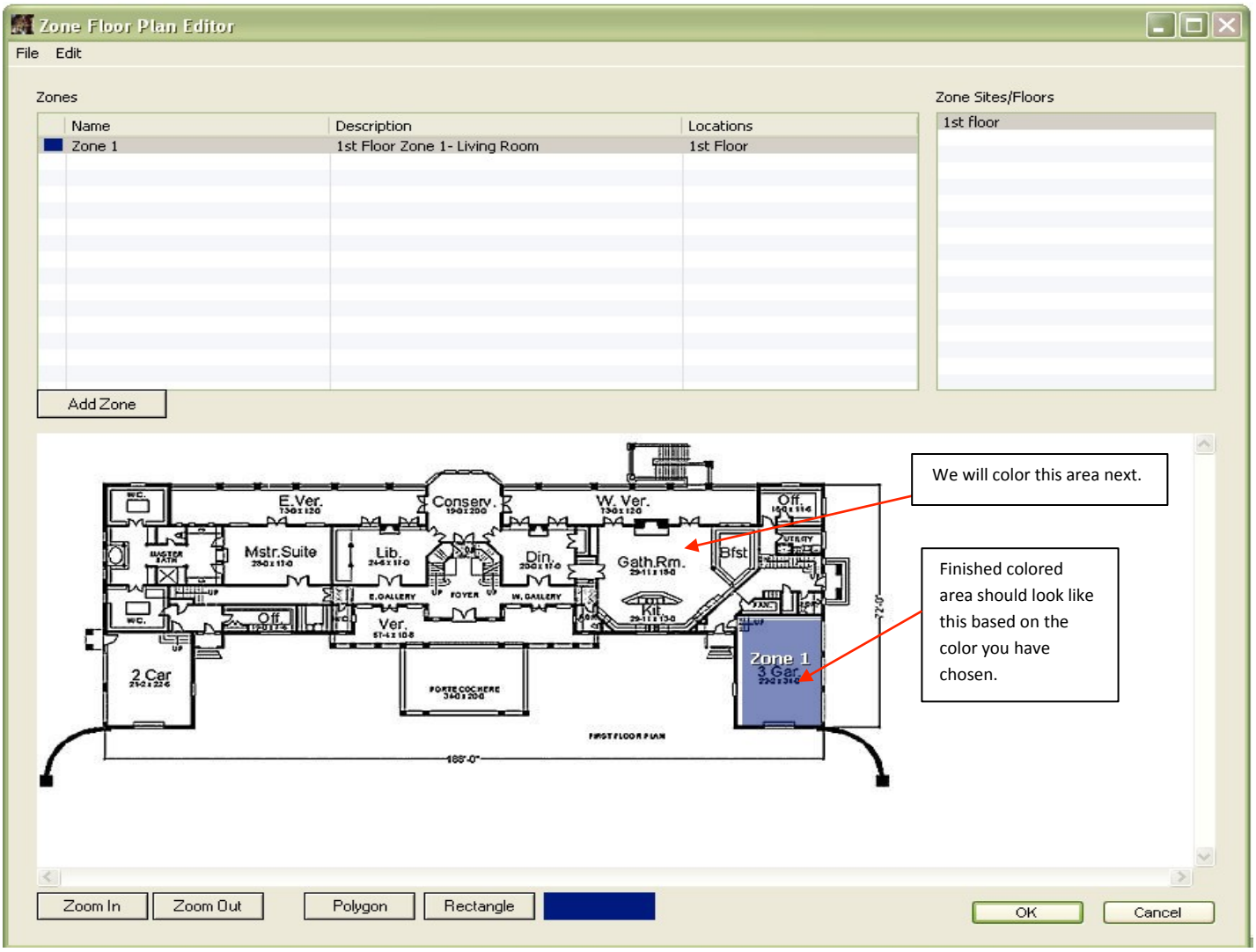
23) The screen shot below is what your colored area should look like.
24) The software will automatically label the zone based on the name you gave it.



25) Now we can use the polygon to color another area of the zone.
26) We are going to color the Gathering Room as a part of the same zone as the garage.

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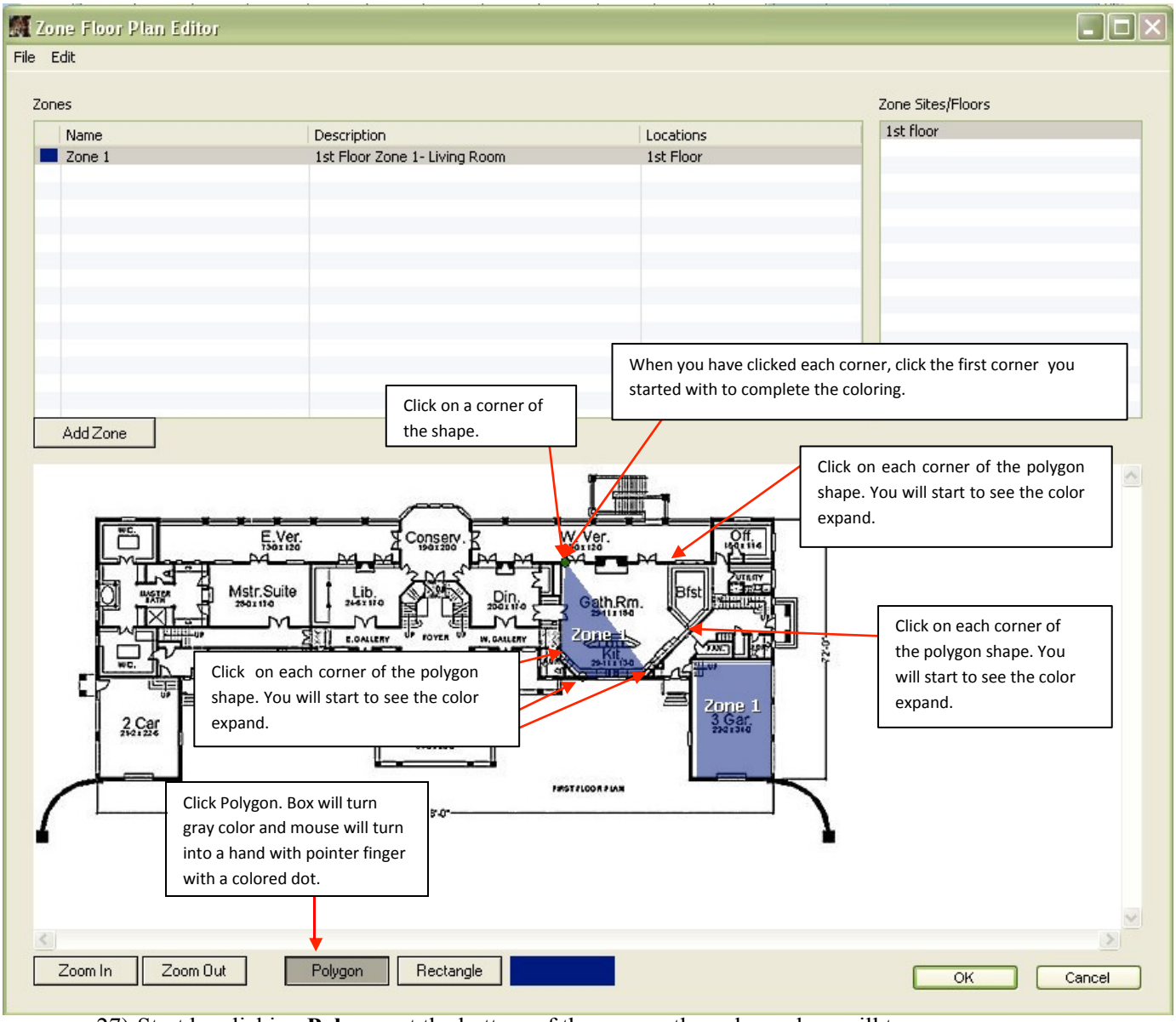

27) Start by clicking **Polygon** at the bottom of the screen, the polygon box will turn gray.
28) The mouse will turn into a hand with a pointer finger and a colored dot.
29) Click any corner of the shape you are coloring.
    a. Click each corner working in a circular motion.
    b. You will see the color start to expand.
    c. When you have clicked every corner in a circular motion, click the first corner you started with, meaning the corner you start with will be clicked twice.
30) The software will automatically label the zone based on the name you have given it.

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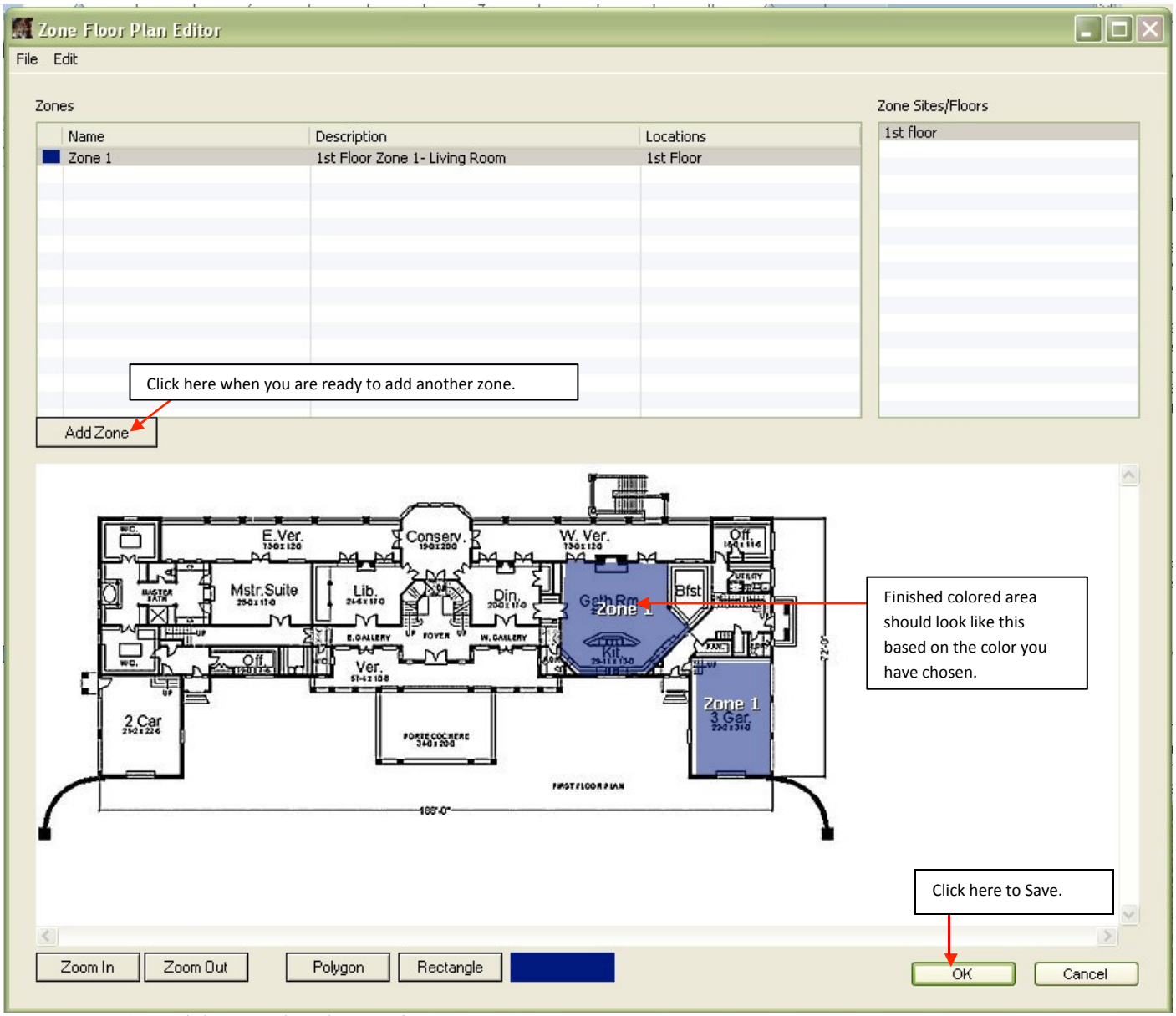

31) To delete a colored area of a zone:
    a. Click the area you wish to delete.
    b. You will see dots in each corner appear.
32) Press **Delete** on your computer keyboard.
33) When you have completed coloring all areas in a zone you are ready to add another zone.
34) To add another zone, click **Add Zone** and follow the steps again.
35) To save or navigate away from this screen, click **OK**.

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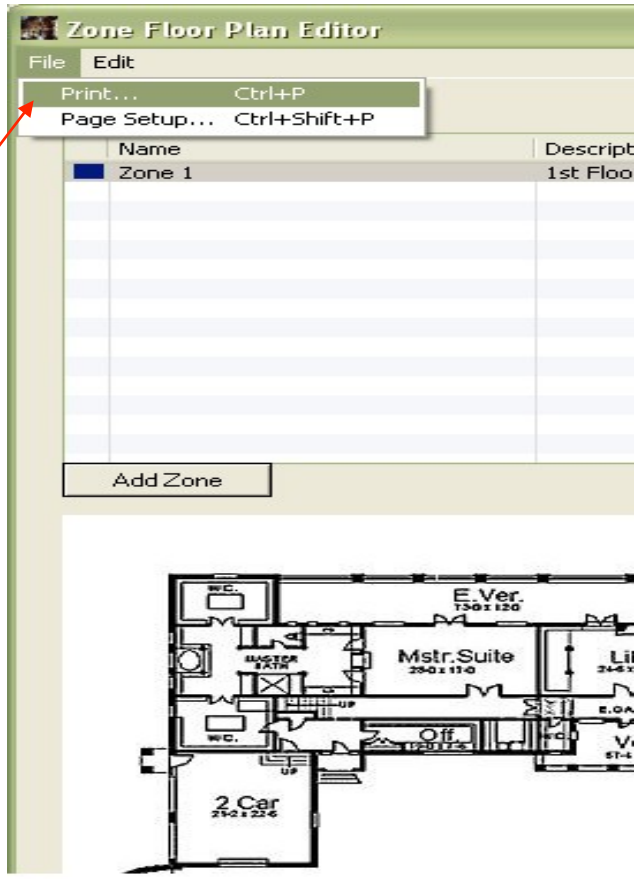
36) When you are ready to print your zones:

a. Go to the Zoning Floor Plan Editor

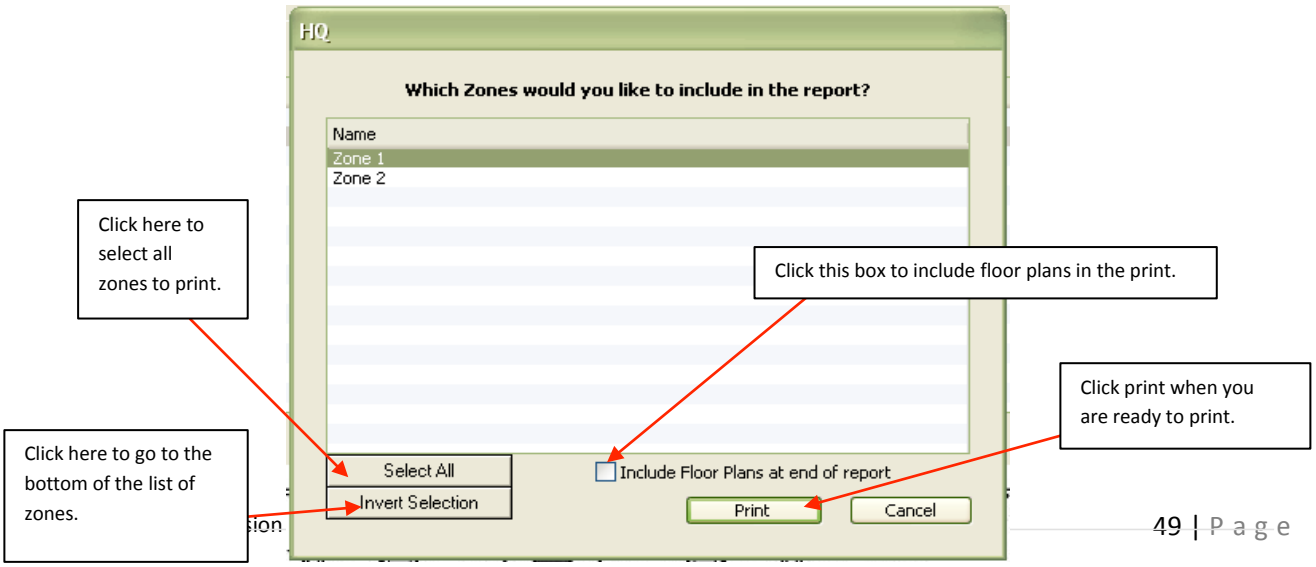
b. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**

c. Click **File** / **Print**.



d. A print screen will appear asking you "Which Zones would you like to include in the report?"

e. You have the option of selecting individual zones, all zones, and to print the colored blueprints.


HQ
Which Zones would you like to include in the report?
Name
Zone 1
Zone 2
Click here to select all zones to print.
Click this box to include floor plans in the print.
Click print when you are ready to print.
Click here to go to the bottom of the list of zones.
Select All
Invert Selection
Include Floor Plans at end of report
Print
Cancel

f. Click **Print**.
g. A print preview page will appear showing what the Zones report will look like on paper.
h. When you are ready to print, click **Print** in the upper right hand corner.

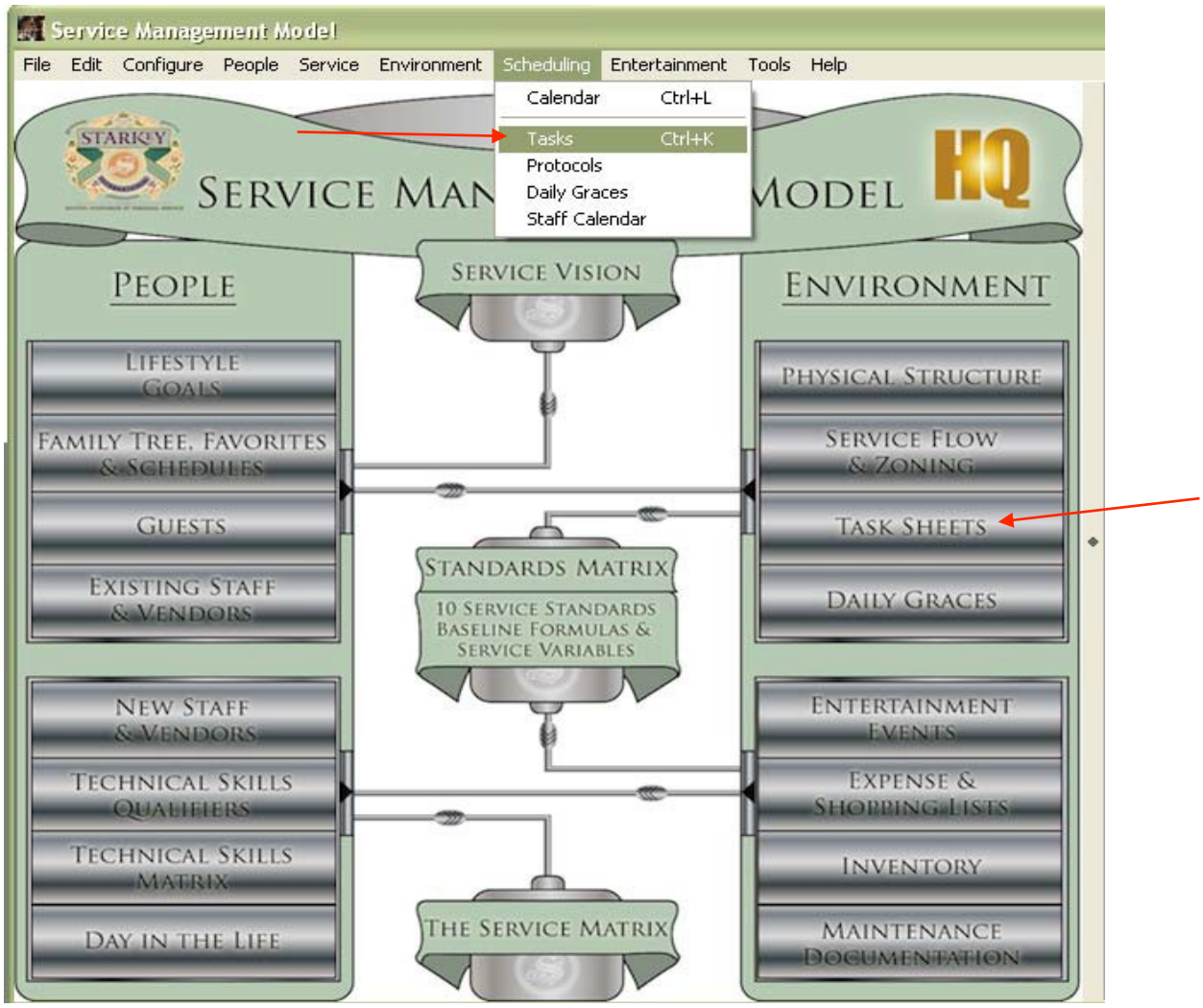
YOU SHOULD NOW HAVE PRINTED ZONES

Section 8: Task Schedules/Sheets

Task sheets are a planning aid to list and organize appropriate duties to be accomplished in each Zone within an Environment, such as dusting, vacuuming, detailing a car, or changing air filters. These task sheets typically address cleaning, maintenance, or safety and protection standards tasks but can be utilized for any of the service standards and may be developed for daily weekly, monthly, or yearly use.

The Starkey Software allows you to create task sheets, edit tasks sheets, assign task sheets to an employee, etc. We will now learn how to create a task sheet.

1) Go to the main Service Management Model screen.
2) Click **Task Sheets** under the Environment column, or click **Scheduling** / **Tasks** from the main menu.



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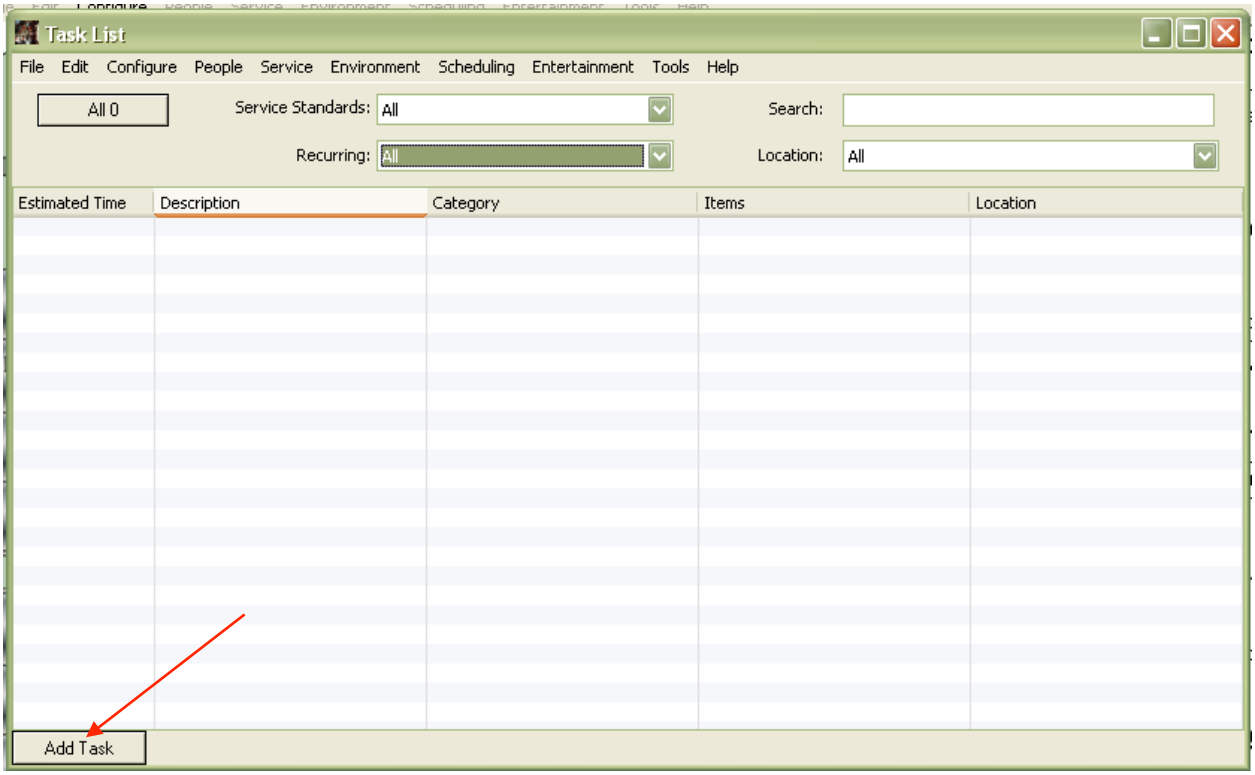
3) The Task List window will appear.
4) To start a new Task Schedule, click **Add Task** in bottom left corner.



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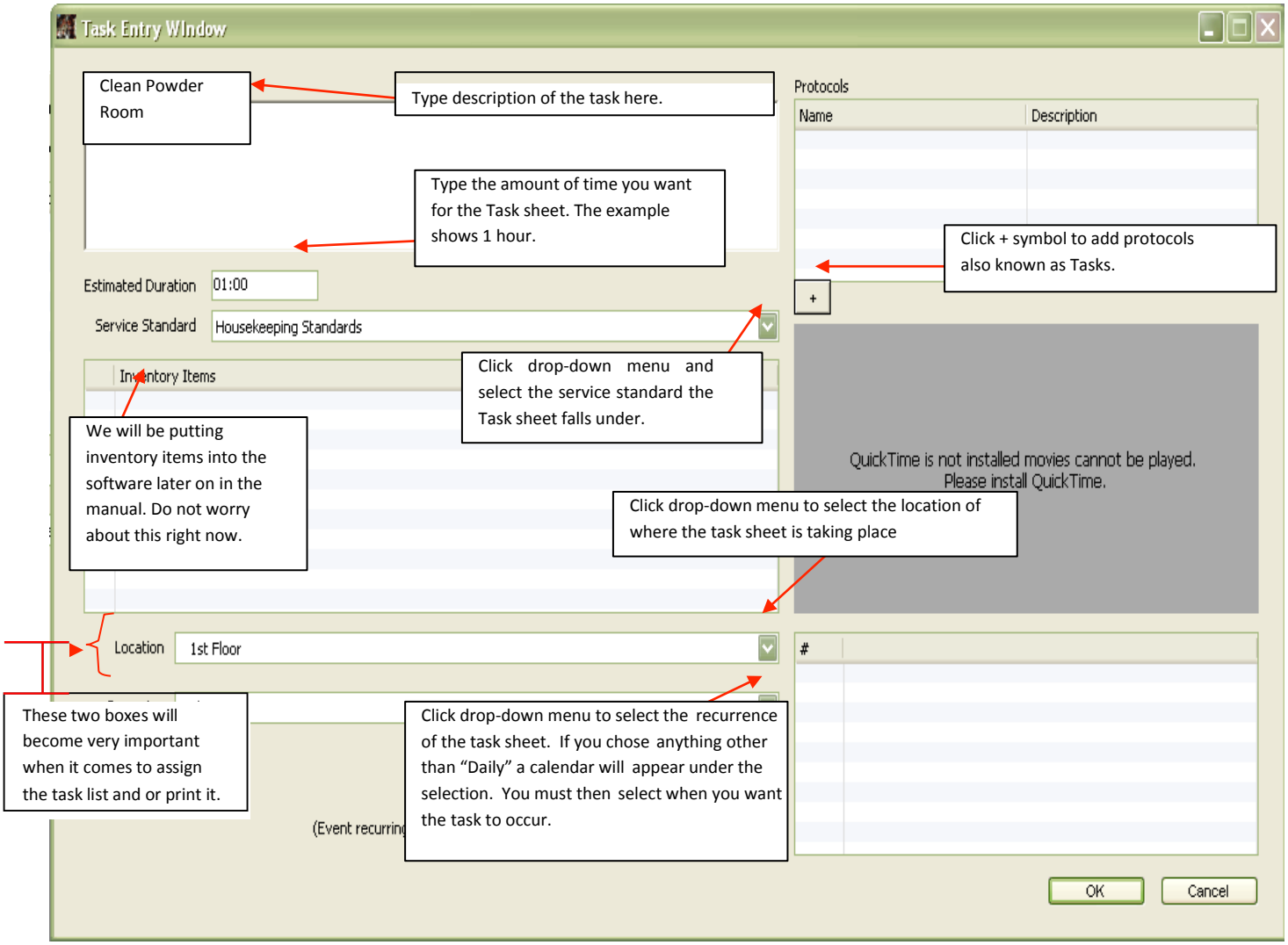
5) The Task Entry Window will appear. Tasks for the Task Sheet are also known as Protocols.
6) For this example we will be making a daily task sheet for the 1st floor powder room.
7) Follow the instructions in the screen shot below to enter data in the fields.


Task Entry Window
Clean Powder Room
Type description of the task here.
Protocols
Name
Description
Type the amount of time you want for the Task sheet. The example shows 1 hour.
Click + symbol to add protocols also known as Tasks.
Estimated Duration
01:00
Service Standard
Housekeeping Standards
+
Click drop-down menu and select the service standard the Task sheet falls under.
Inventory Items
We will be putting inventory items into the software later on in the manual. Do not worry about this right now.
QuickTime is not installed movies cannot be played. Please install QuickTime.
Click drop-down menu to select the location of where the task sheet is taking place
Location
1st Floor
#
These two boxes will become very important when it comes to assign the task list and or print it.
Click drop-down menu to select the recurrence of the task sheet. If you chose anything other than "Daily" a calendar will appear under the selection. You must then select when you want the task to occur.
(Event recurring
OK
Cancel

8) In the above screen on the right hand corner you will see the Protocols box.
9) To add a protocol also known as a Task click the + symbol. We will go over Videos/QuickTime later in this guide.
10) The Add Protocol window will appear.

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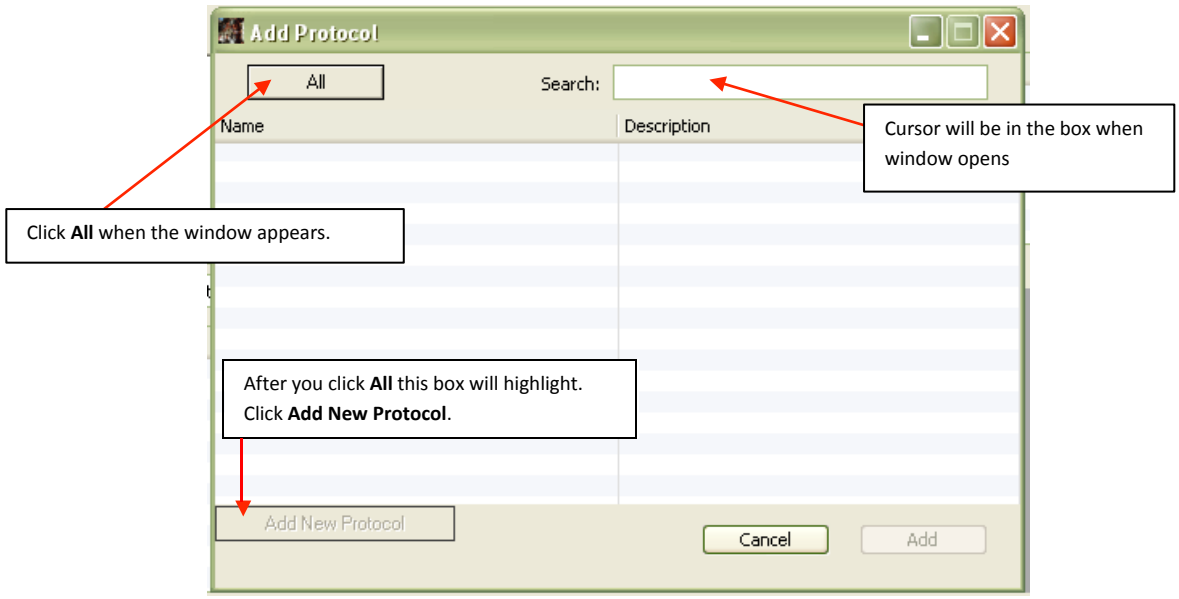

Add Protocol

1) The cursor will be in the search field.
2) Click **All** in the top left hand corner.
3) Click **Add New Protocol** in the bottom left hand corner.
4) The Protocol Window will appear.
5) Retype the name of the Task Sheet in the "Name" field.
6) Type a description of the task sheet in the "Description" field.
7) If you would like to add a QuickTime Video:
    a. Download QuickTime for FREE at http://www.apple.com/quicktime/download/
    b. Once you have downloaded QuickTime, click the + symbol and drag the video into the QuickTime area. (see example on next page)
8) Click the + symbol to begin adding each individual task.

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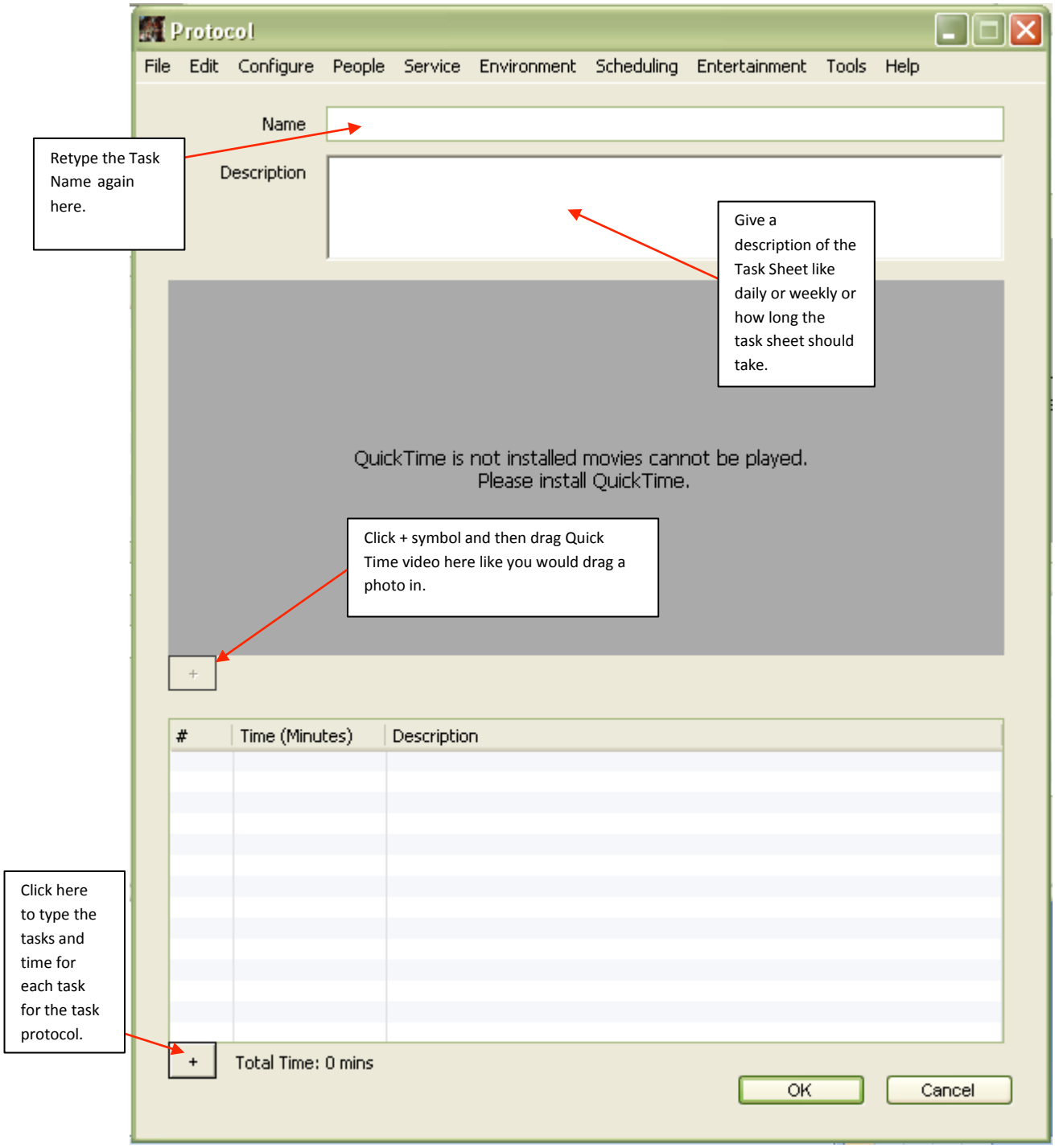
Protocol
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
Name
Description
Retype the Task Name again here.
Give a description of the Task Sheet like daily or weekly or how long the task sheet should take.
QuickTime is not installed movies cannot be played.
Please install QuickTime.
Click + symbol and then drag Quick Time video here like you would drag a photo in.
+
Time (Minutes) Description
Click here to type the tasks and time for each task for the task protocol.
+
Total Time: 0 mins
OK
Cancel

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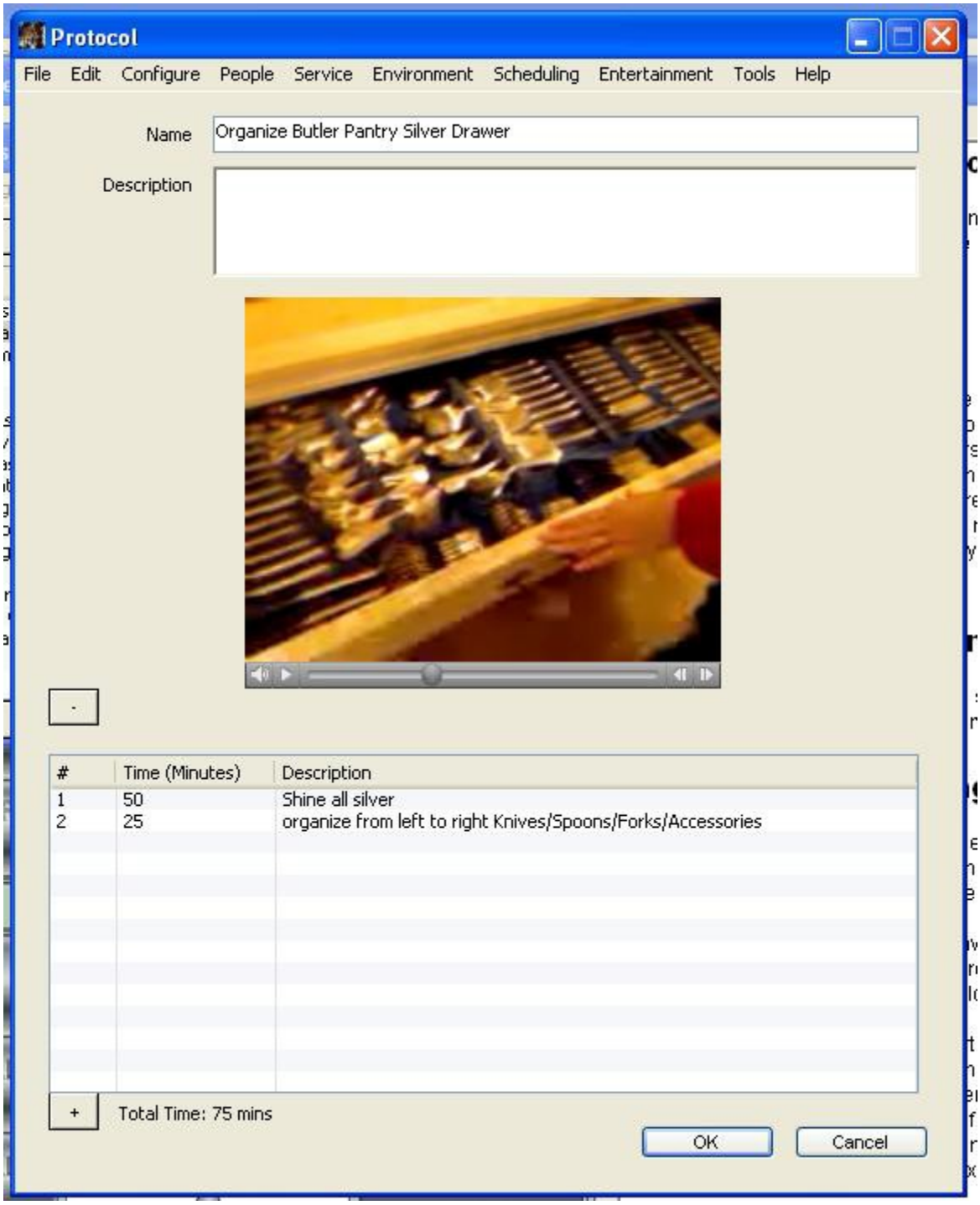
This is an example of what the Protocol screen will look like once you have added a Quick Time video.



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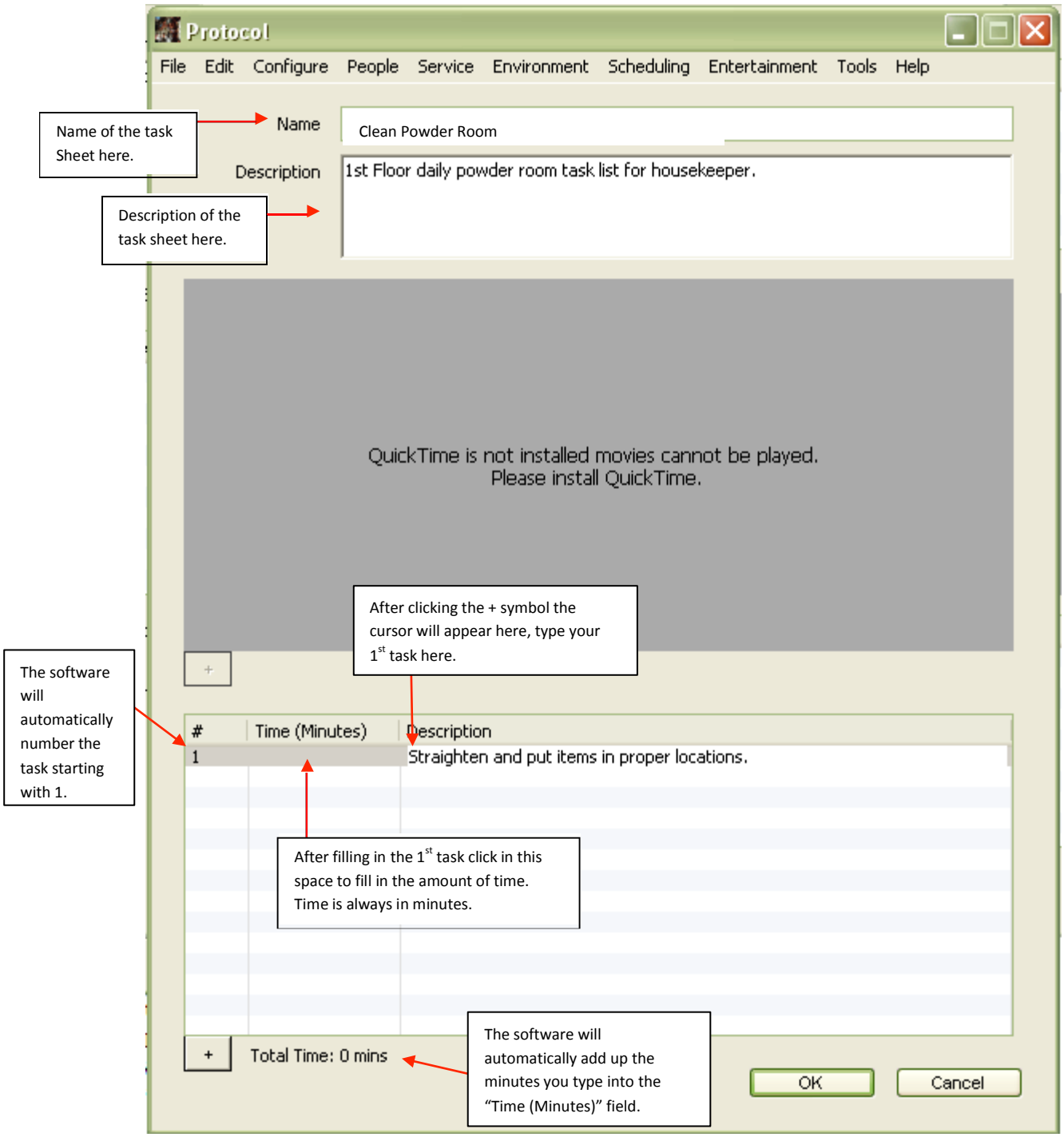
Protocol
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
Name of the task Sheet here.
Name
Clean Powder Room
Description
1st Floor daily powder room task list for housekeeper.
Description of the task sheet here.
QuickTime is not installed movies cannot be played.
Please install QuickTime.
After clicking the + symbol the cursor will appear here, type your 1st task here.
The software will automatically number the task starting with 1.
Time (Minutes) Description
1 Straighten and put items in proper locations.
After filling in the 1st task click in this space to fill in the amount of time. Time is always in minutes.
+ Total Time: 0 mins
The software will automatically add up the minutes you type into the "Time (Minutes)" field.
OK
Cancel

1) After clicking the + symbol the cursor will appear in the **Description** column.
2) Type the first task for your task sheet.
3) Click the gray space under the **Time (Minutes)** column.
4) Type the number of minutes to perform the task. You will notice a number 1 in the # column. The software will automatically number the tasks starting with the first task being number 1.
5) When you are ready to add the next task, click +.
6) You must go in order of the tasks you want completed. The software will not allow you to add a task out of order.

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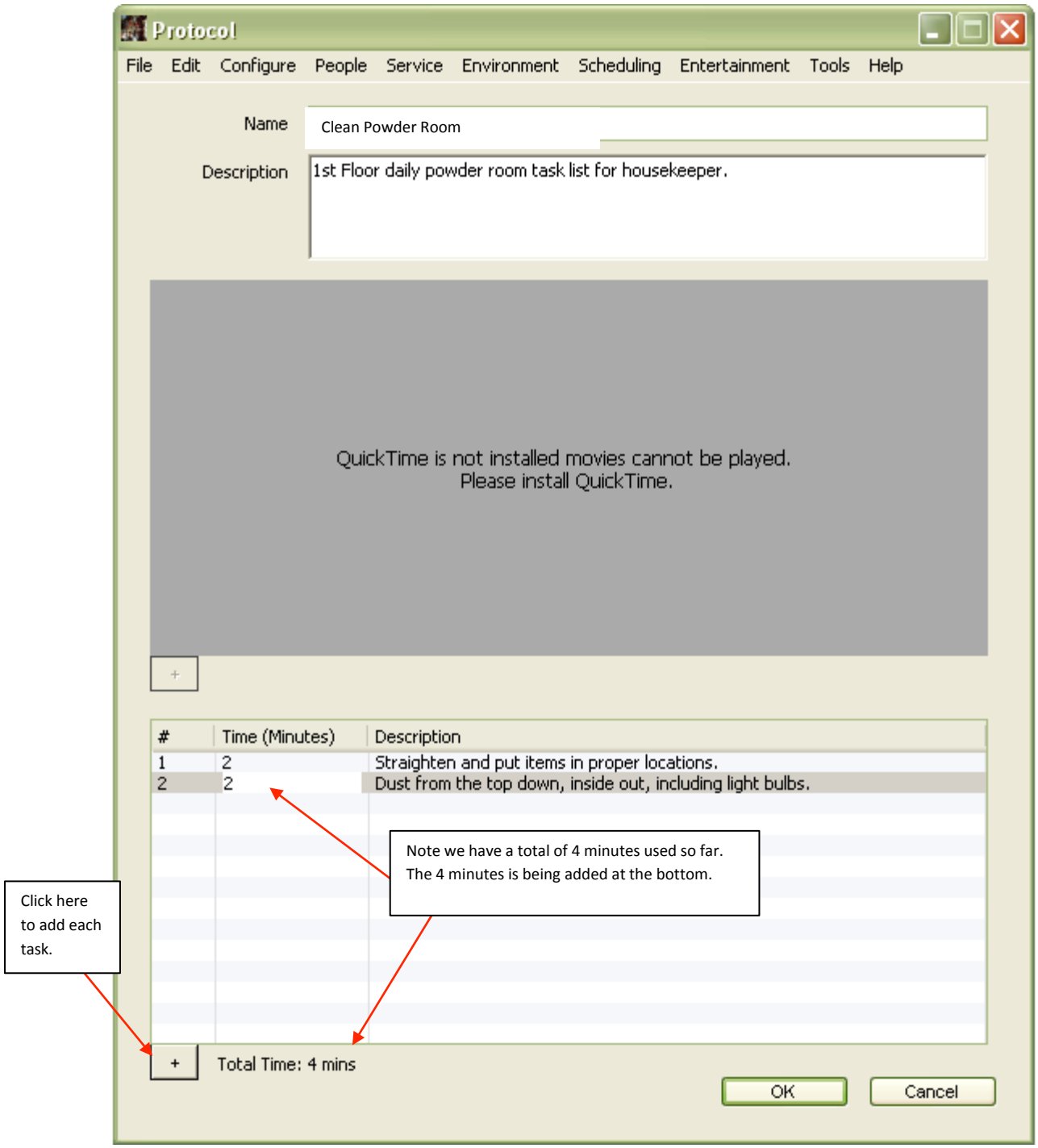
Protocol
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
Name
Clean Powder Room
Description
1st Floor daily powder room task list for housekeeper.
QuickTime is not installed movies cannot be played.
Please install QuickTime.
+
Time (Minutes) Description
1 2 Straighten and put items in proper locations.
2 2 Dust from the top down, inside out, including light bulbs.
Note we have a total of 4 minutes used so far.
The 4 minutes is being added at the bottom.
Click here to add each task.
+
Total Time: 4 mins
OK
Cancel

7) As you type in the number of minutes for each task it is being added up at the bottom.
   a. Remember at the beginning of creating this task sheet we said it would take an hour to complete. Meaning you have 60 minutes to use for this task sheet. You can also change the time if you need more or less time for the task sheet.
8) Click + to continue adding each task.
9) Once you have added all your tasks, click **OK** in the bottom right hand corner
10) The **Add Protocol** window will appear
11) Click **Show All (number).**
12) Highlight the Task sheet you created.
13) Click **Add** at the bottom right hand corner.

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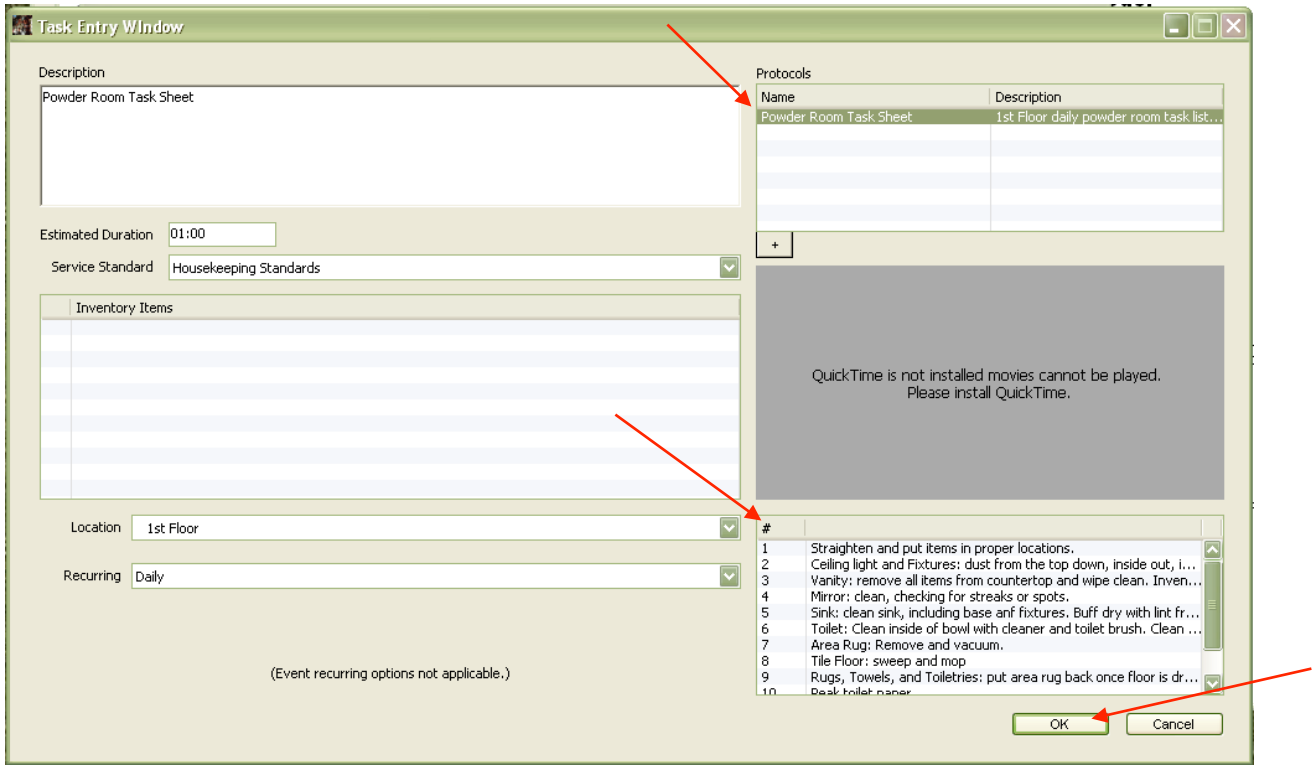
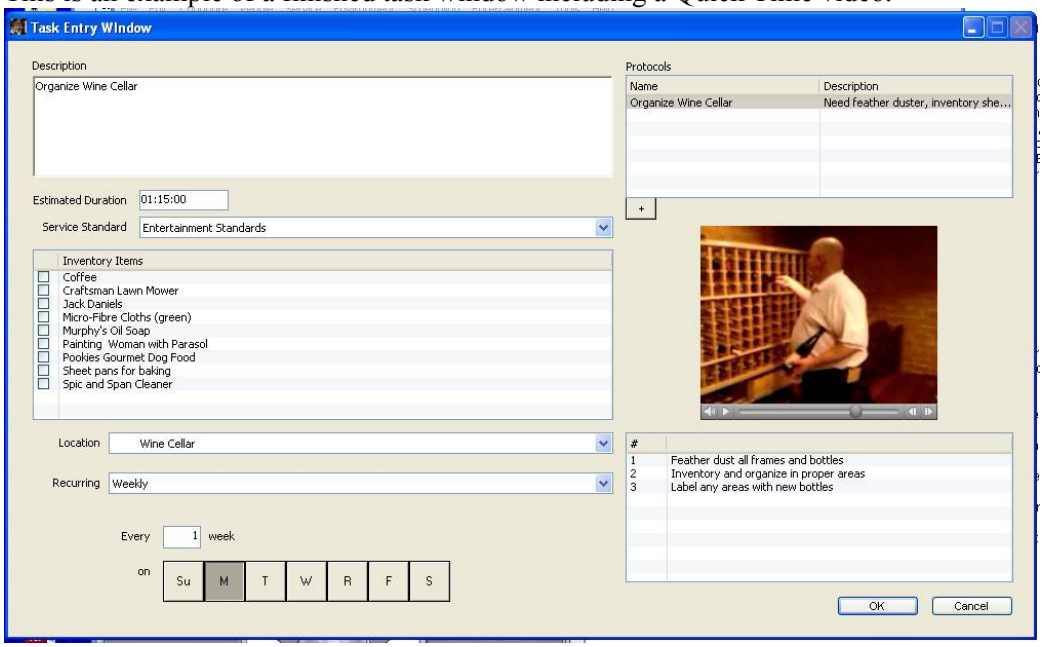
14) The **Task Entry Window** will appear, with the added protocol list in the upper right hand box.
15) Highlight the protocol and the task list will appear in lower right hand corner box.
16) Click OK.


Task Entry Window
Description
Powder Room Task Sheet
Protocols
Name
Description
Powder Room Task Sheet
1st Floor daily powder room task list...
Estimated Duration
01:00
Service Standard
Housekeeping Standards
Inventory Items
QuickTime is not installed movies cannot be played.
Please install QuickTime.
Location
1st Floor
Recurring
Daily
(Event recurring options not applicable.)
#
1 Straighten and put items in proper locations.
2 Ceiling light and Fixtures: dust from the top down, inside out, i...
3 Vanity: remove all items from countertop and wipe clean. Inven...
4 Mirror: clean, checking for streaks or spots.
5 Sink: clean sink, including base anf fixtures. Buff dry with lint fr...
6 Toilet: Clean inside of bowl with cleaner and toilet brush. Clean ...
7 Area Rug: Remove and vacuum.
8 Tile Floor: sweep and mop
9 Rugs, Towels, and Toiletries: put area rug back once floor is dr...
OK
Cancel

This is an example of a finished task window including a Quick Time video.



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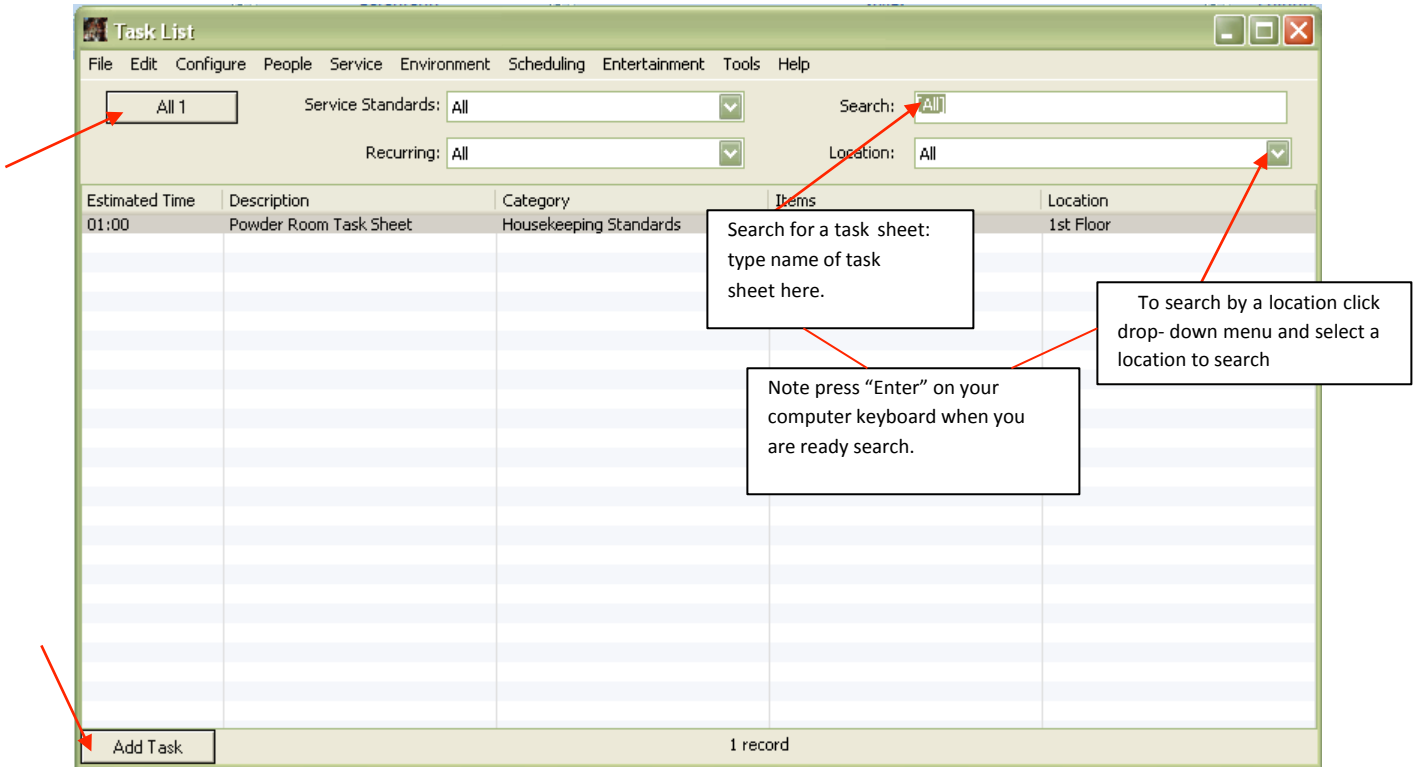
17) The **Task List** window will appear.
18) Click **All (number)** to show all Task Sheets. To create another Task Sheet, click **Add Task**.
19) To create a duplicate task, click **Duplicate** in the bottom left. An identical task will be created. Double-click to modify it.



20) When you are ready to print a Task Sheet, click **Scheduling** on the Task List window toolbar or click **Scheduling / Calendar** on the main menu**.**

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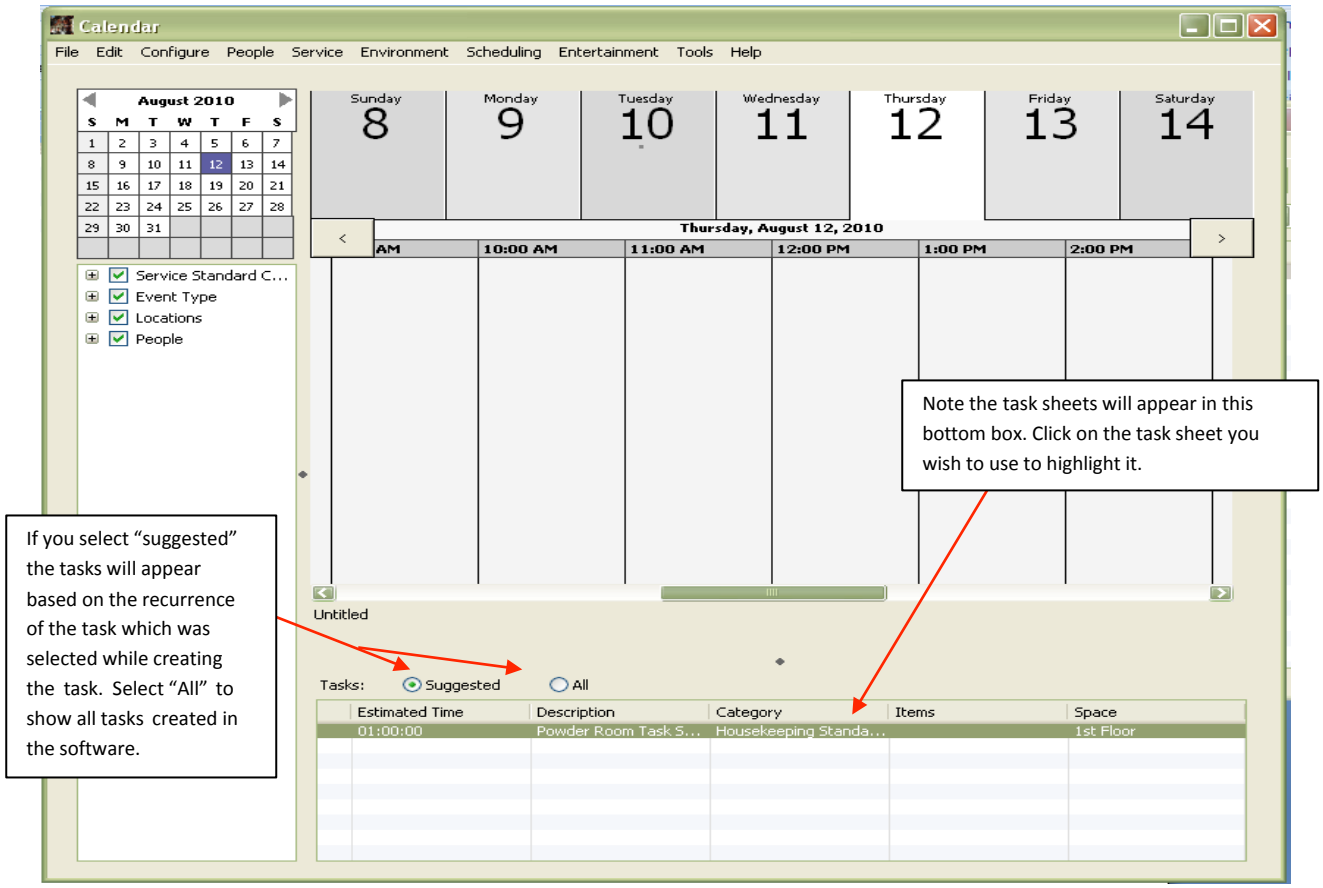
21) The Calendar will appear.
22) The Task Sheets you create will appear in the box at the bottom of the Calendar.
23) Click the Task Sheet you wish to use. The Task Sheet will become highlighted.



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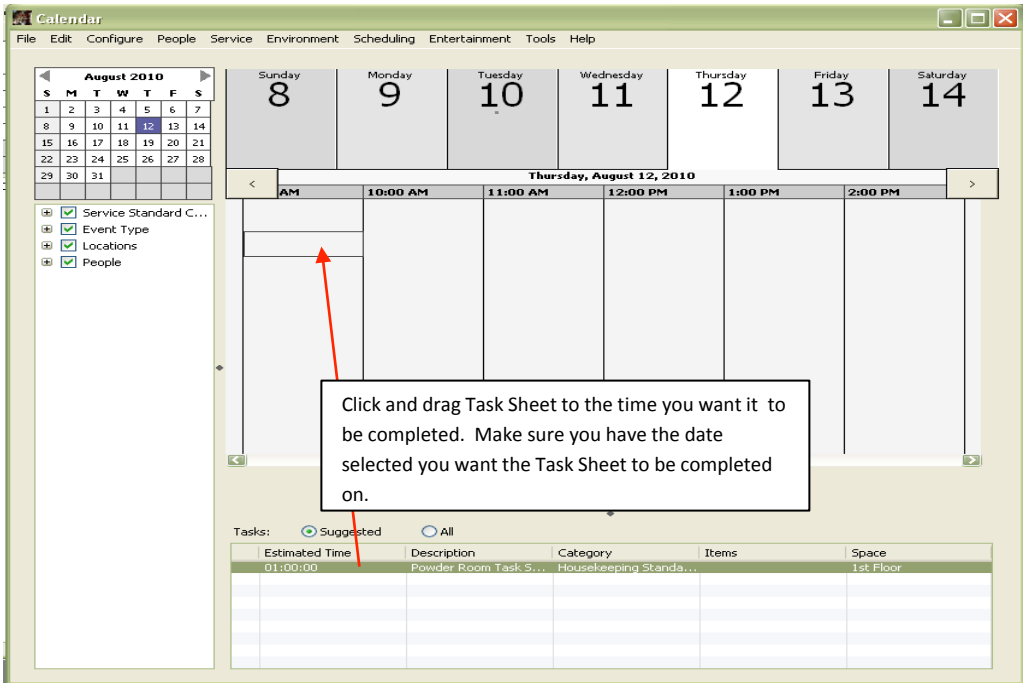
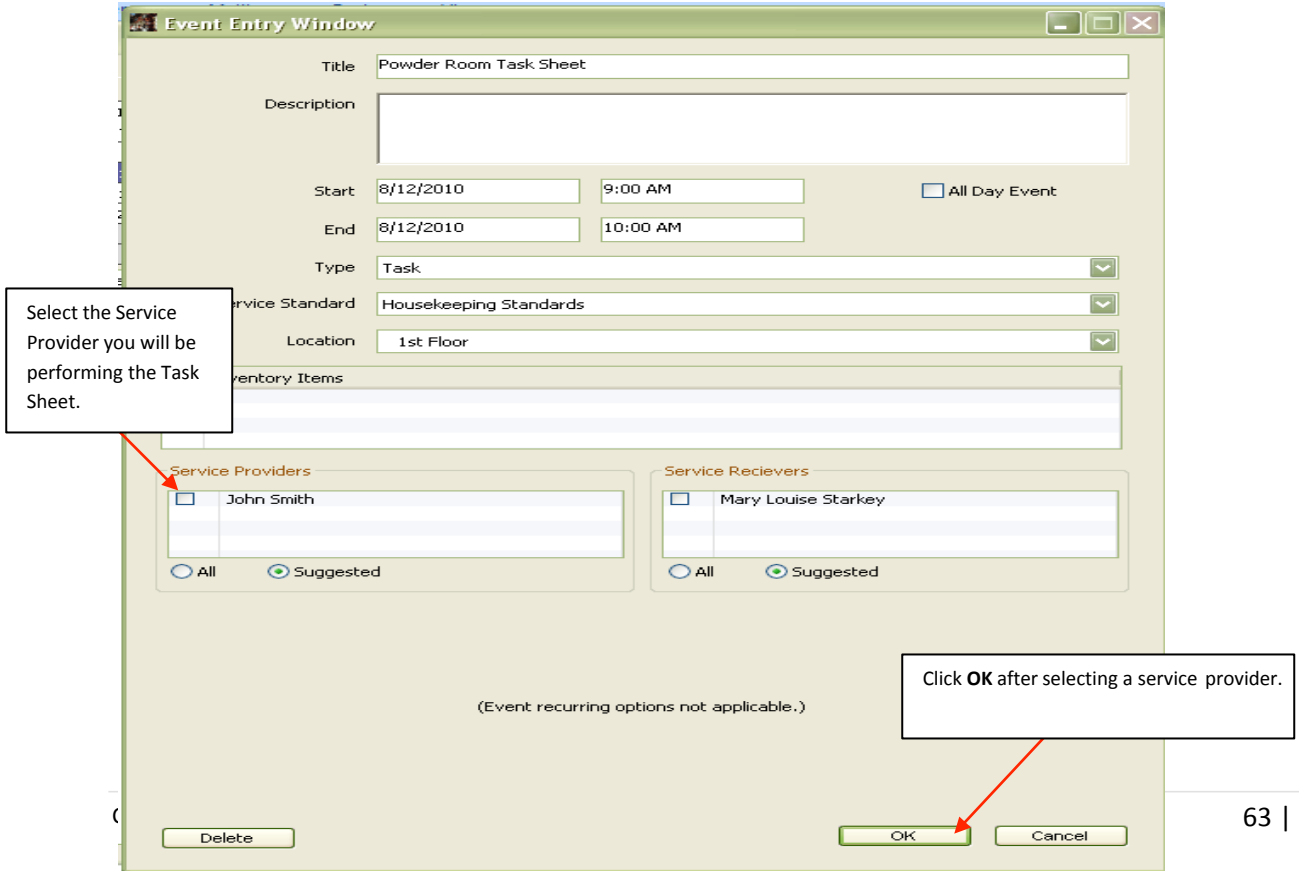
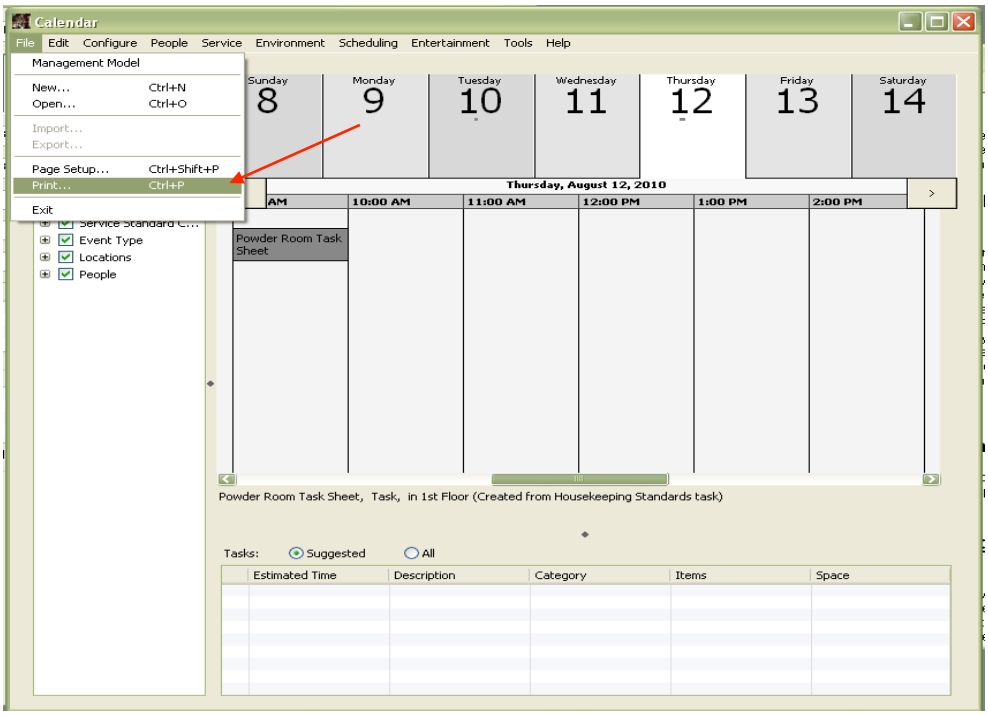
24) Click the day you want the Task Sheet to be done.
25) Click the highlighted Task Sheet and drag it onto the calendar on the day and time you want the task sheet to be done.



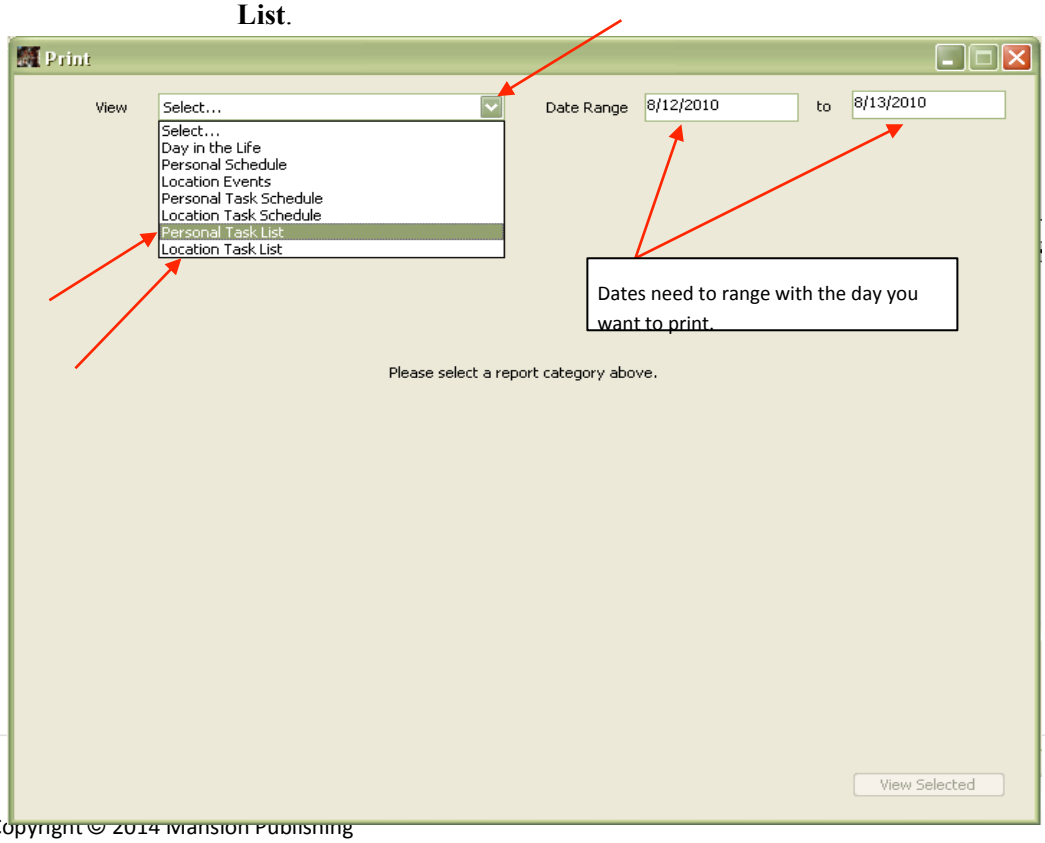
26) The **Event Entry Window** will appear.
27) Select a **Service Provider** who will be completing the Task Sheet.
28) Click **OK** after selecting a Service Provider



29) The Calendar will appear with the Task Sheet as an event on the Calendar.
30) For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**
31) Click **File** / **Print** from the menu.



32) A print screen will appear like you are printing a schedule.
33) Click the **View** drop-down menu and click **Personal Task List** or **Location Task List**.



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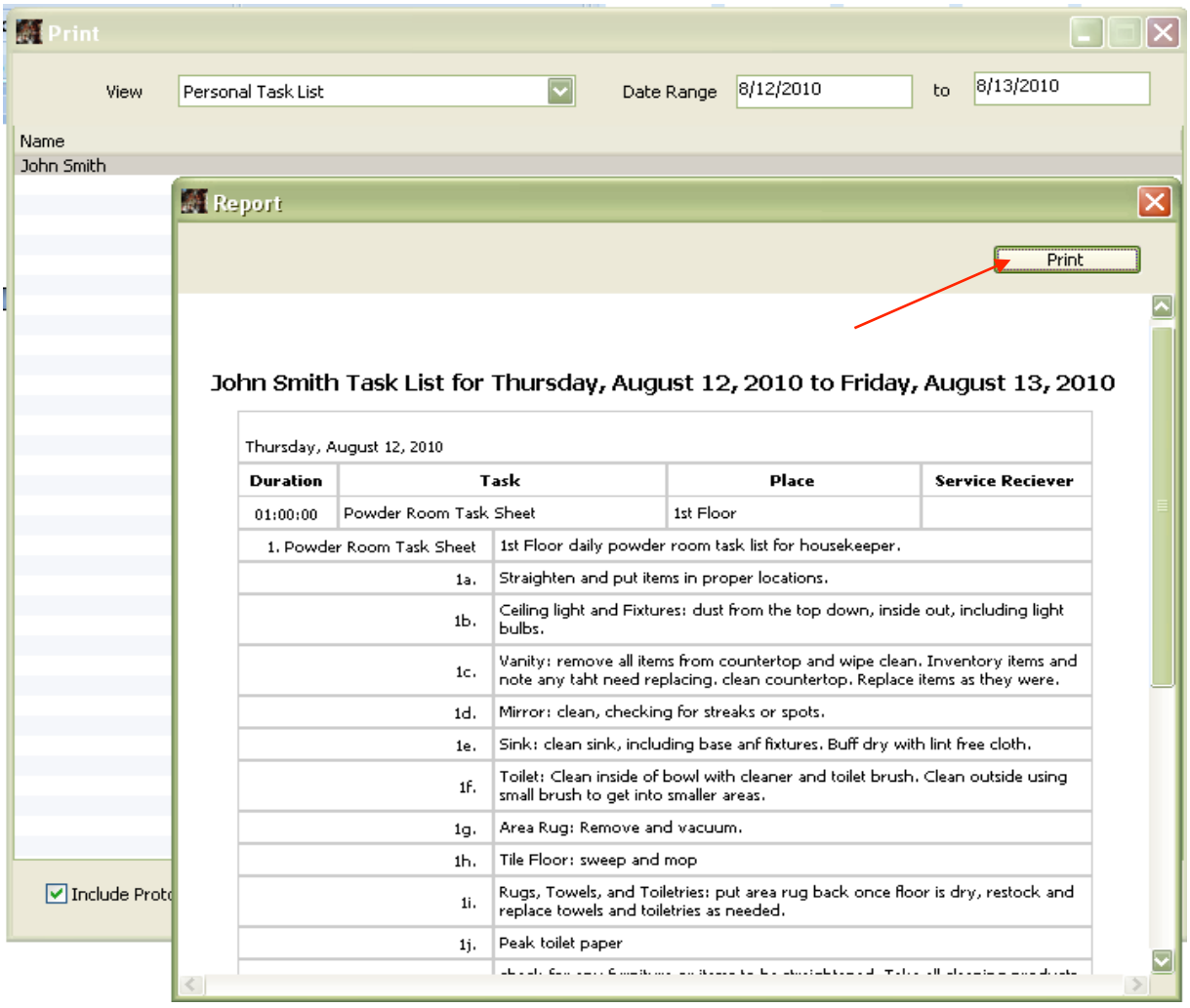
34) If you click **Personal Task List**:
    a. A list of all the employees will appear.
    b. Click to highlight the individual you assigned to the Task Sheet.
    c. Click to check box in lower left hand corner **Include Protocols and Inventory**.
    d. Click **View Selected** at the bottom right hand corner.
    e. A print screen will appear which will allow you to preview the task sheet.
35) Click **Print** in upper right hand corner when you are ready to print.


Print
View
Personal Task List
Date Range
8/12/2010
to
8/13/2010
Name
John Smith
Report
Print
John Smith Task List for Thursday, August 12, 2010 to Friday, August 13, 2010
Thursday, August 12, 2010
Duration
Task
Place
Service Reciever
01:00:00
Powder Room Task Sheet
1st Floor
1. Powder Room Task Sheet
1st Floor daily powder room task list for housekeeper.
1a.
Straighten and put items in proper locations.
1b.
Ceiling light and Fixtures: dust from the top down, inside out, including light bulbs.
1c.
Vanity: remove all items from countertop and wipe clean. Inventory items and note any taht need replacing. clean countertop. Replace items as they were.
1d.
Mirror: clean, checking for streaks or spots.
1e.
Sink: clean sink, including base anf fixtures. Buff dry with lint free cloth.
1f.
Toilet: Clean inside of bowl with cleaner and toilet brush. Clean outside using small brush to get into smaller areas.
1g.
Area Rug: Remove and vacuum.
1h.
Tile Floor: sweep and mop
1i.
Rugs, Towels, and Toiletries: put area rug back once floor is dry, restock and replace towels and toiletries as needed.
1j.
Peak toilet paper

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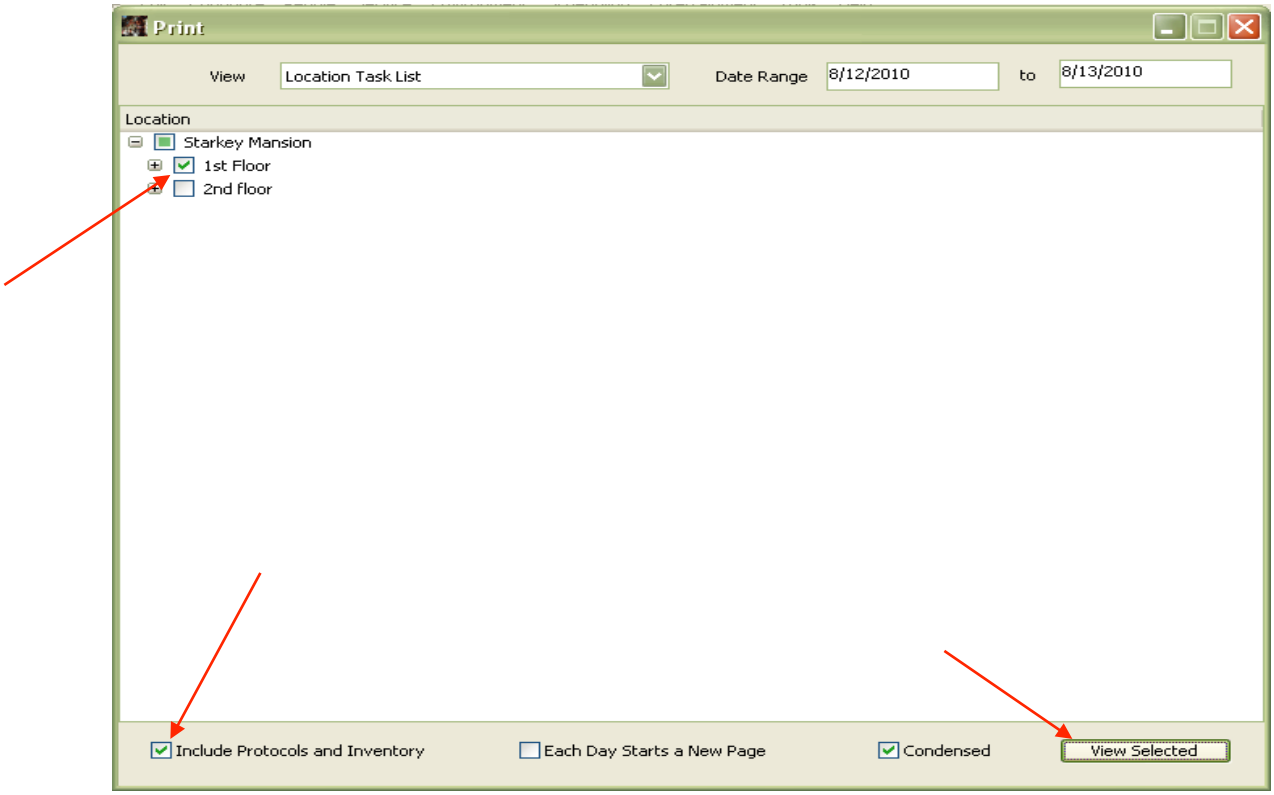
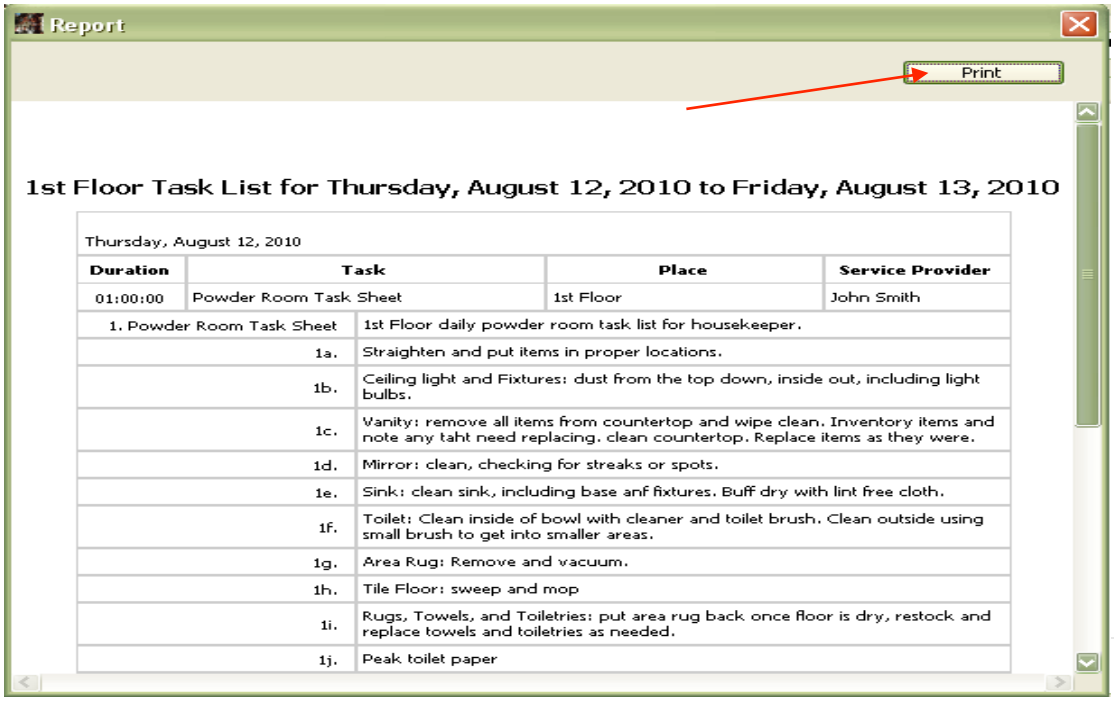
36) If you Click **Location Task List**:

a. The Location List you created will appear.
b. Expand the main house to your floors by clicking + symbol.
c. Click box next to the Floor where the Task Sheet will be completed.
d. Click **Include Protocols and Inventory** box in lower left hand corner.
e. Click **View Selected** in lower right hand corner.



f. A print screen will appear.
g. Click **Print** in upper right hand corner when you are ready to print.


Report
Print
1st Floor Task List for Thursday, August 12, 2010 to Friday, August 13, 2010
Thursday, August 12, 2010
Duration
Task
Place
Service Provider
01:00:00
Powder Room Task Sheet
1st Floor
John Smith
1. Powder Room Task Sheet
1st Floor daily powder room task list for housekeeper.
1a. Straighten and put items in proper locations.
1b. Ceiling light and Fixtures: dust from the top down, inside out, including light bulbs.
1c. Vanity: remove all items from countertop and wipe clean. Inventory items and note any taht need replacing. clean countertop. Replace items as they were.
1d. Mirror: clean, checking for streaks or spots.
1e. Sink: clean sink, including base anf fixtures. Buff dry with lint free cloth.
1f. Toilet: Clean inside of bowl with cleaner and toilet brush. Clean outside using small brush to get into smaller areas.
1g. Area Rug: Remove and vacuum.
1h. Tile Floor: sweep and mop
1i. Rugs, Towels, and Toiletries: put area rug back once floor is dry, restock and replace towels and toiletries as needed.
1j. Peak toilet paper

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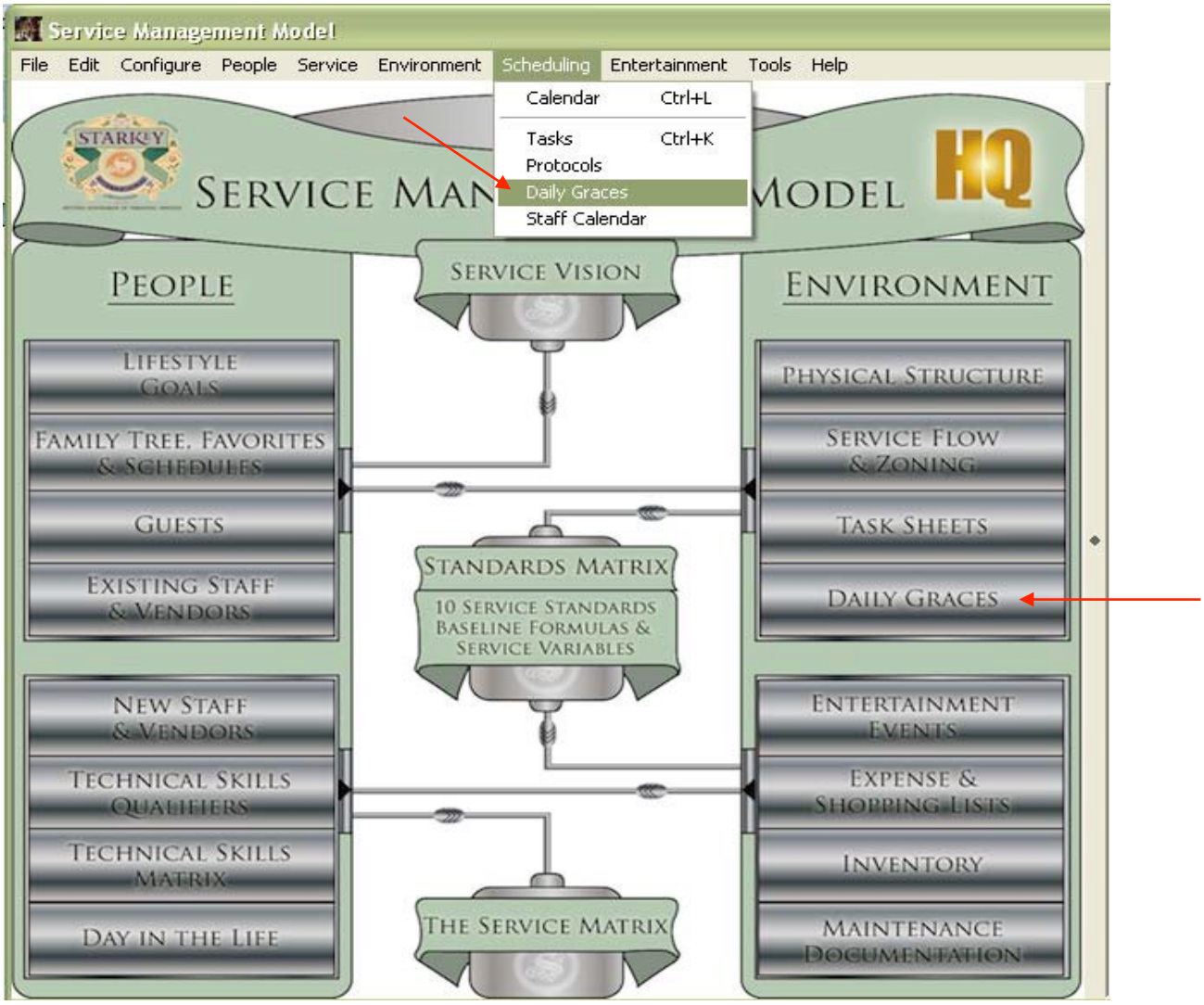
YOU SHOULD NOW HAVE A PRINTED TASK SHEET

Section 9: Daily Graces

Daily Graces is the service term coined by Starkey that describes the more personal tasks and the duties that are to be done on a daily basis. The duties are intended to be a maintenance measure for the weekly cleaning process. Daily Graces ultimately provide an underlying daily foundation or structure and set an overall Service Standard within an environment. Daily Graces are specified as Morning Graces, Evening Graces, and Personal Graces. These might include opening the home, feeding pets, turning down beds, and walking the property.

Like the Task Sheet the Starkey Software is designed to aid you in creating Daily Grace task sheets as well as assigning them to employees to be provided to a service receiver like a Principal.

1) Navigate to the main Management Model screen.
2) Click **Daily Graces** in the Environment column or click **Scheduling** / **Daily Graces** from the main menu.



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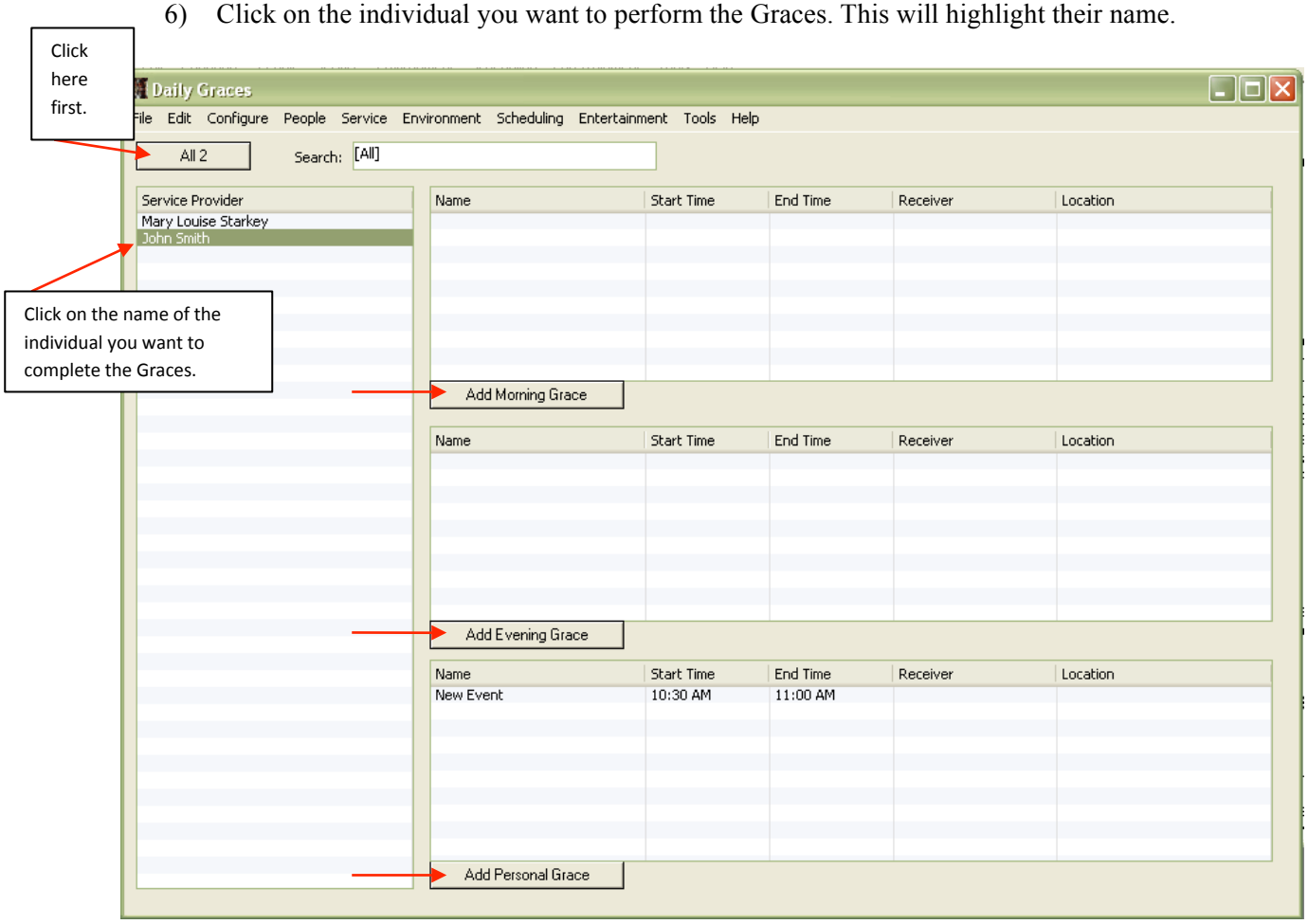
3) The **Daily Graces** window will appear.
4) Click **All** in upper left hand corner.
5) All people will appear in the service provider column on the left side of screen.
6) Click on the individual you want to perform the Graces. This will highlight their name.


Click here first.
Click on the name of the individual you want to complete the Graces.
Daily Graces
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
All 2
Search: [All]
Service Provider
Mary Louise Starkey
John Smith
Name Start Time End Time Receiver Location
Add Morning Grace
Name Start Time End Time Receiver Location
Add Evening Grace
Name Start Time End Time Receiver Location
New Event 10:30 AM 11:00 AM
Add Personal Grace

7) Click **Add Morning Grace** or **Add Evening Grace** or **Add Personal Grace**.
8) The **Daily Grace Entry** window will appear.
9) See next page for screen shot.
    a. Type the Daily Grace Title into the **Title** field.
    b. Type a description of what the Daily graces is in the **Description** field.
    c. Select a start and end date.
    d. Type in the start time next to the start date including AM/PM.
    e. Type in the end time next to the end date including AM/PM.
    f. Select the location where the grace will take place from the **Location** drop-down menu.
    g. Select a Service Receiver only if you are performing a personal grace for that receiver.
    h. Later on in the manual we will add inventory items to the software which you can add to a Daily Grace if you would like.
    i. Select the recurrence of the Grace if applicable in the **Recurring** drop-down menu.
        i. Select if the recurrence ends if applicable.
    j. Click **OK** when finished.

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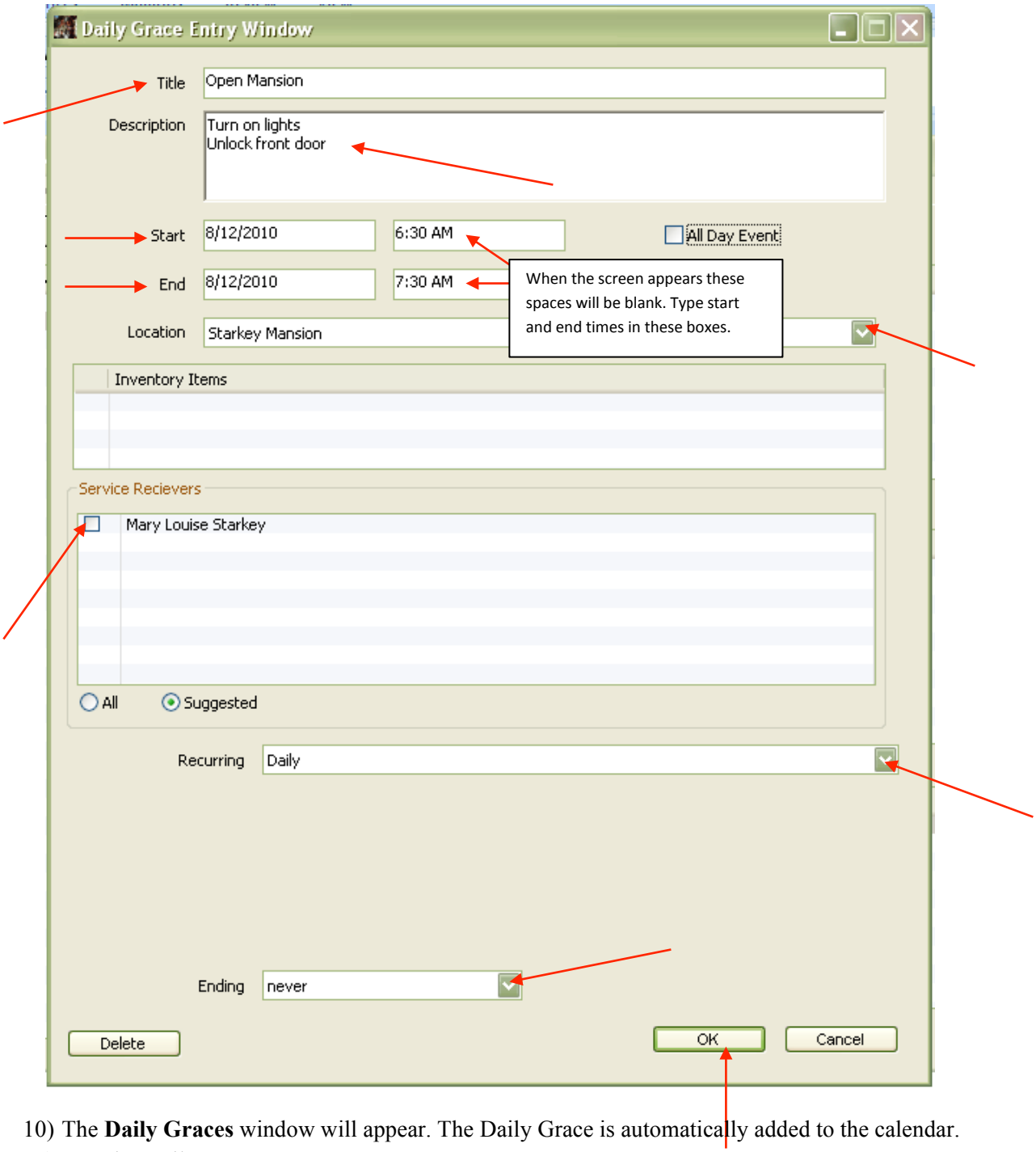

10) The **Daily Graces** window will appear. The Daily Grace is automatically added to the calendar.
11) To print Daily Graces:
    a. Click to highlight the Service Provider who is performing the Graces you want printed.
    b. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**
    c. Click **File** / **Print** from the menu.
    d. A print preview screen will appear.
    e. Click **Print** in the upper right hand corner of the screen to print the document.

YOU SHOULD NOW HAVE PRINTED DAILY GRACES FOR THE INDIVIDUAL YOU SELECTED.

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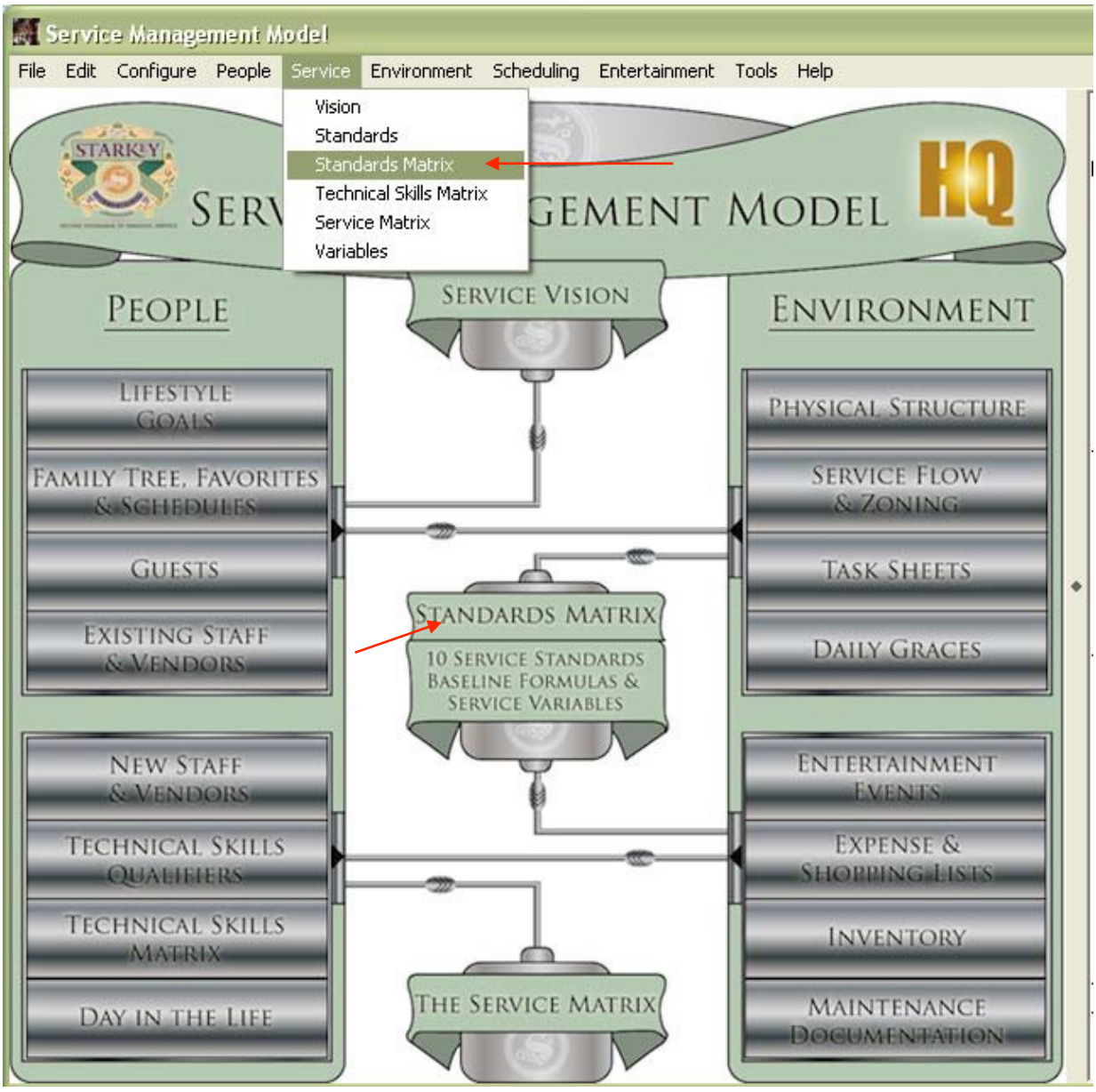
Section 10: The Standards Matrix

The Standards Matrix is a management tool used to identify and qualify Service Standards of the People and the Environment. The standards matrix is correlated to the Technical Skills matrix to identify levels of Service expectations and required skill level of staff.

The Starkey Software has developed the Standards Matrix questionnaire which should be filled out by the Principals within the first few weeks of employment. If the Principals had a site visit with Mrs. Starkey they will have already filled out this questionnaire.

To access the questionnaire on the software:

1) Click **Standards Matrix** in the center of the main Service Management Model screen or click **Service** / **Standards Matrix** from the main menu.



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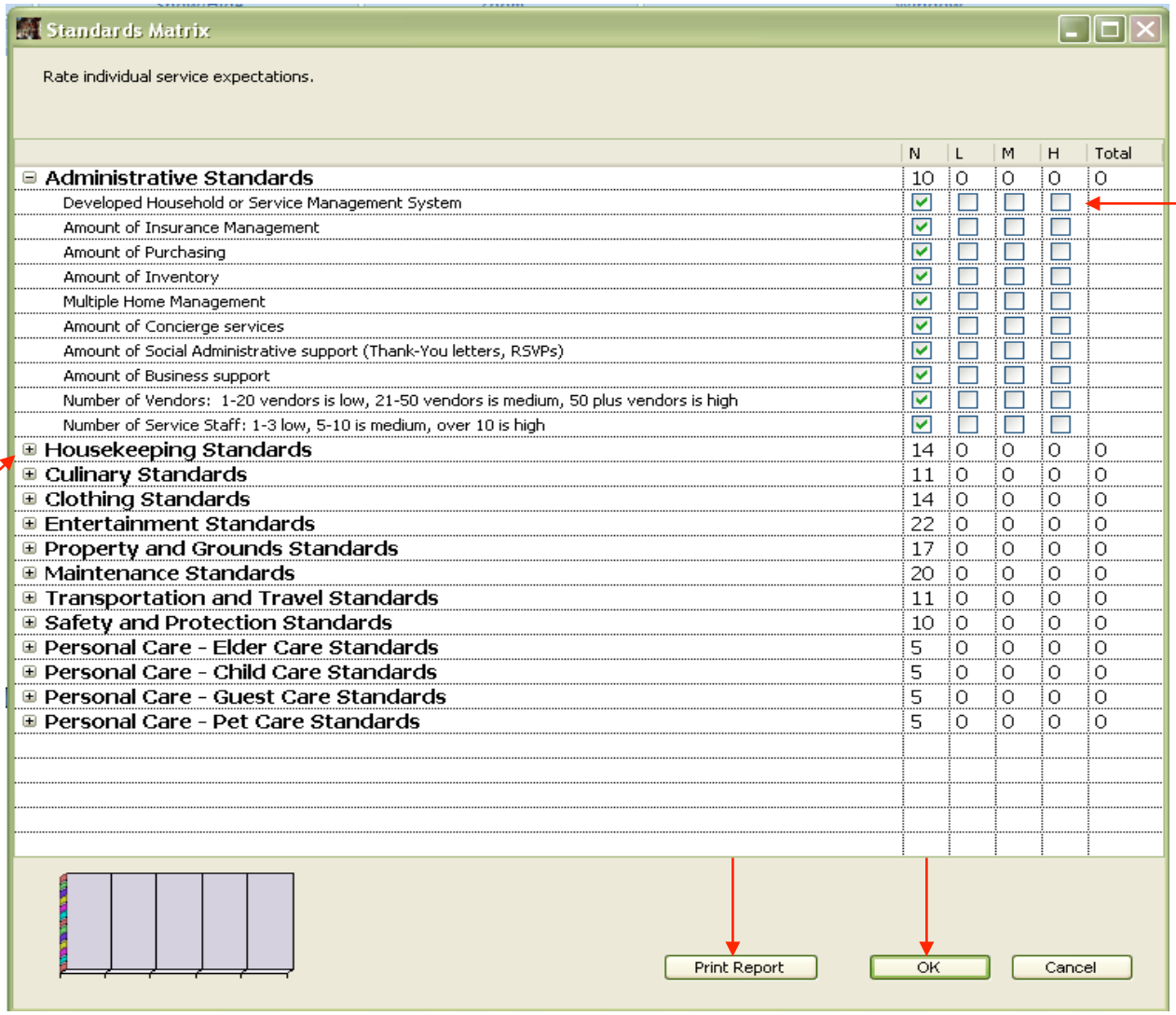
2) The Standards Matrix screen will appear.
3) You will see the 10 Standards with the + symbol next to each one.
4) Click the + symbol to expand the Standard.
5) You will see a series of questions under each standard.
    a. If you are printing this questionnaire for your principal to complete, expand each standard prior to printing in order to print all questions.
6) Click the various boxes next to each question to answer the question.


Standards Matrix
Rate individual service expectations.
N L M H Total
Administrative Standards 10 0 0 0 0
Developed Household or Service Management System
Amount of Insurance Management
Amount of Purchasing
Amount of Inventory
Multiple Home Management
Amount of Concierge services
Amount of Social Administrative support (Thank-You letters, RSVPs)
Amount of Business support
Number of Vendors: 1-20 vendors is low, 21-50 vendors is medium, 50 plus vendors is high
Number of Service Staff: 1-3 low, 5-10 is medium, over 10 is high
Housekeeping Standards 14 0 0 0 0
Culinary Standards 11 0 0 0 0
Clothing Standards 14 0 0 0 0
Entertainment Standards 22 0 0 0 0
Property and Grounds Standards 17 0 0 0 0
Maintenance Standards 20 0 0 0 0
Transportation and Travel Standards 11 0 0 0 0
Safety and Protection Standards 10 0 0 0 0
Personal Care - Elder Care Standards 5 0 0 0 0
Personal Care - Child Care Standards 5 0 0 0 0
Personal Care - Guest Care Standards 5 0 0 0 0
Personal Care - Pet Care Standards 5 0 0 0 0
Print Report
OK
Cancel

7) For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**
8) Once you have answered all questions, click **File** / **Print**.
9) You will be asked whether you want to include detail, or summary only. Click your selection.
10) A print screen will appear showing how the report will print.
11) Click **Print** in the upper right hand corner.
12) Click the red X in the upper right hand corner to exit the print screen.
13) **BEFORE you navigate away from the Standards Matrix questions click OK to save.**

YOU SHOULD NOW HAVE A PRINTED STANDARD MATRIX

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Section 11: The 10 Service Standards

The Service Standards are statements that articulate individual service expectations and that are People and environment-centered. There are ten Service Standard categories: Administrative, Housekeeping, Culinary, Clothing and Valet, Transportation and Travel, Safety and Protection, and Personal Standards, which includes Child Care, Elder Care, Guest Care, and Pet Care. There is a baseline for each standard. There is also a variable which is what occurs in your household.

Each Standard statement must include who, what, and when.

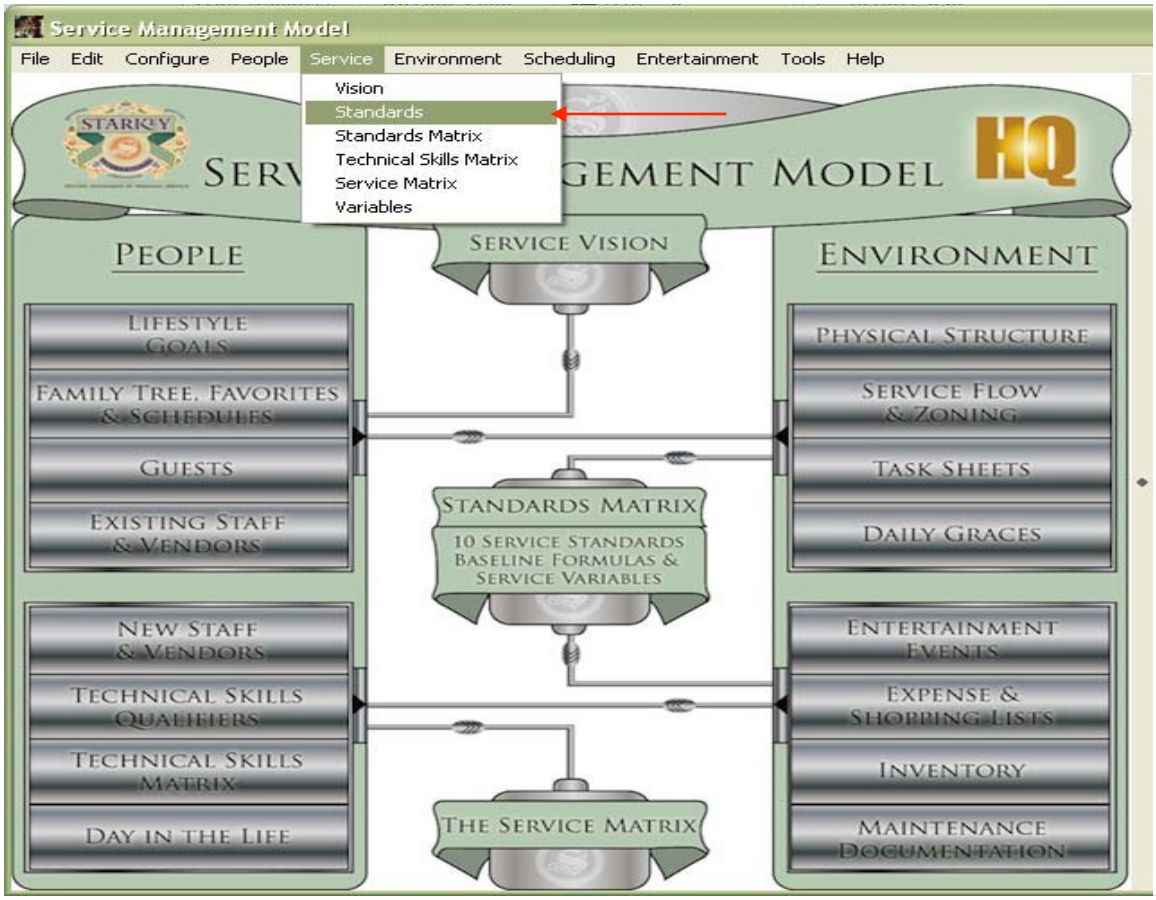
For example "The HM will open the home at 6:30am daily"
Who: The HM
What: opens home
When: 6:30am daily

Standards can also be taken from the favorites in the people profiles.

For example the favorite is "Mrs. Starkey prefers cold Caffeine Free Diet Coke"
The Standard would be "Chef will take inventory and restock Caffeine Free Diet Coke in the kitchen refrigerator daily.
Who: Chef
What: inventory and restock Diet Coke
When: Daily

Standards provide structure to the service environment. The Starkey Software allows you to create and change Standards as they occur.

1) On the main menu, click **Service** / **Standards**.



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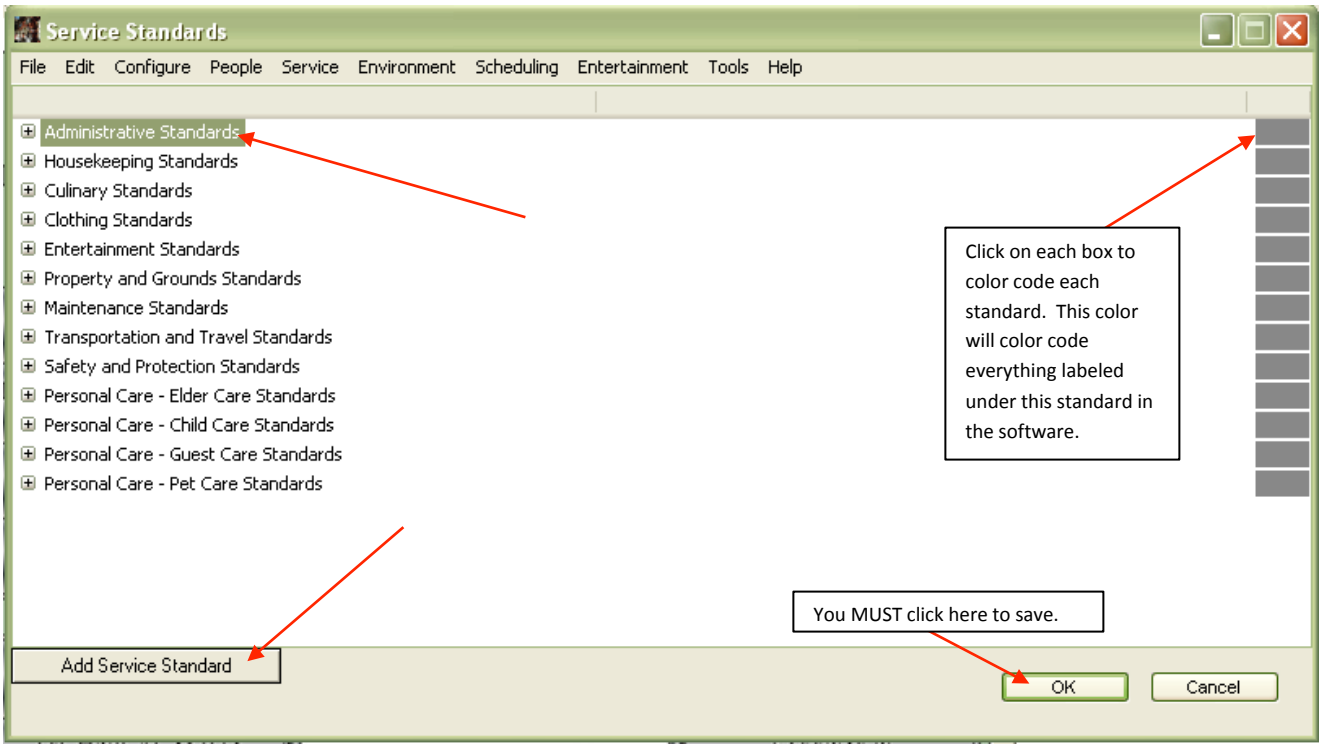
2) The Service Standards screen will appear.
3) The gray boxes on the right hand side of the screen can be clicked on individually to color code the standard. This color will carry over to the rest of the software to match the Standard.
4) Click **Administrative Standards** to highlight it
5) Click **Add Service Standard** at the bottom left hand corner of the screen.


Service Standards
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
Administrative Standards
Housekeeping Standards
Culinary Standards
Clothing Standards
Entertainment Standards
Property and Grounds Standards
Maintenance Standards
Transportation and Travel Standards
Safety and Protection Standards
Personal Care - Elder Care Standards
Personal Care - Child Care Standards
Personal Care - Guest Care Standards
Personal Care - Pet Care Standards
Click on each box to color code each standard. This color will color code everything labeled under this standard in the software.
You MUST click here to save.
Add Service Standard
OK
Cancel

6) The cursor will appear under the highlighted standard.
7) Type "Baseline".
8) Press Tab on your keyboard to advance the cursor to the next field to the right.
9) Type the Baseline information in a sentence or statement.
10) Click **Add Service Standard**.
11) Type "Variable"
12) Press Tab on your keyboard to advance the cursor.
13) Type your variable information in a sentence or statement.
14) Click **Add Service Standard**.
15) Type what the Standard is about like "Cell Phones"
16) Press Tab on your keyboard.
17) Type your standard that corresponds with the Cell Phone Standard like "The HM will ensure that all phones are blackberries when replacing."
18) Repeat steps 14 to 17 for each standard you are adding.
19) When you are ready to move onto the next standard category, click it to highlight it.
20) Click **Add Service Standard** at the bottom left hand corner of the screen.
21) The cursor will appear under the highlighted standard.
22) Type "Baseline"
23) Repeat steps 7 to 18.

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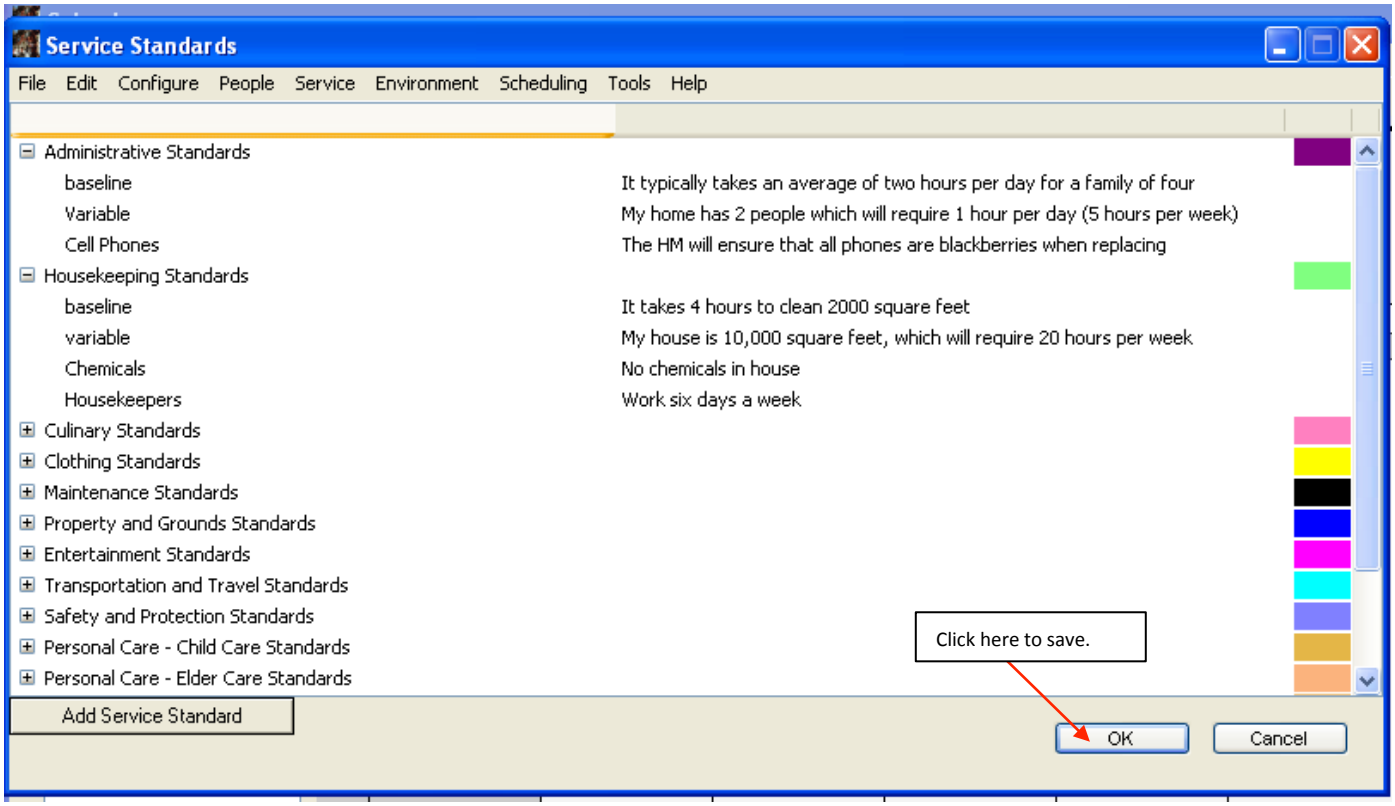
24) To make changes to a Standard, double-click the standard until you see the cursor and it is no longer highlighted. Then make your changes.
25) To delete a Standard, click the standard to highlight it and press Delete on your keyboard.
26) To navigate away from this screen click **OK** to Save.


Service Standards
File Edit Configure People Service Environment Scheduling Tools Help
Administrative Standards
baseline
It typically takes an average of two hours per day for a family of four
Variable
My home has 2 people which will require 1 hour per day (5 hours per week)
Cell Phones
The HM will ensure that all phones are blackberries when replacing
Housekeeping Standards
baseline
It takes 4 hours to clean 2000 square feet
variable
My house is 10,000 square feet, which will require 20 hours per week
Chemicals
No chemicals in house
Housekeepers
Work six days a week
Culinary Standards
Clothing Standards
Maintenance Standards
Property and Grounds Standards
Entertainment Standards
Transportation and Travel Standards
Safety and Protection Standards
Personal Care - Child Care Standards
Personal Care - Elder Care Standards
Click here to save.
Add Service Standard
OK
Cancel

27) When you are ready to print, navigate to the Service Standards window.
28) For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**
29) Click **File** / **Print** from the main menu.
30) A print screen will appear asking
    a. "Would you like to print each Service Standard Category on its own page?"
    b. Click "Yes" or "No" based on what you would like.
31) The print report screen will appear allowing you to preview what the documents will look like on paper.
32) Click **Print** in upper right hand corner when you are ready to print.

YOU SHOULD NOW HAVE PRINTED SERVICE STANDARDS

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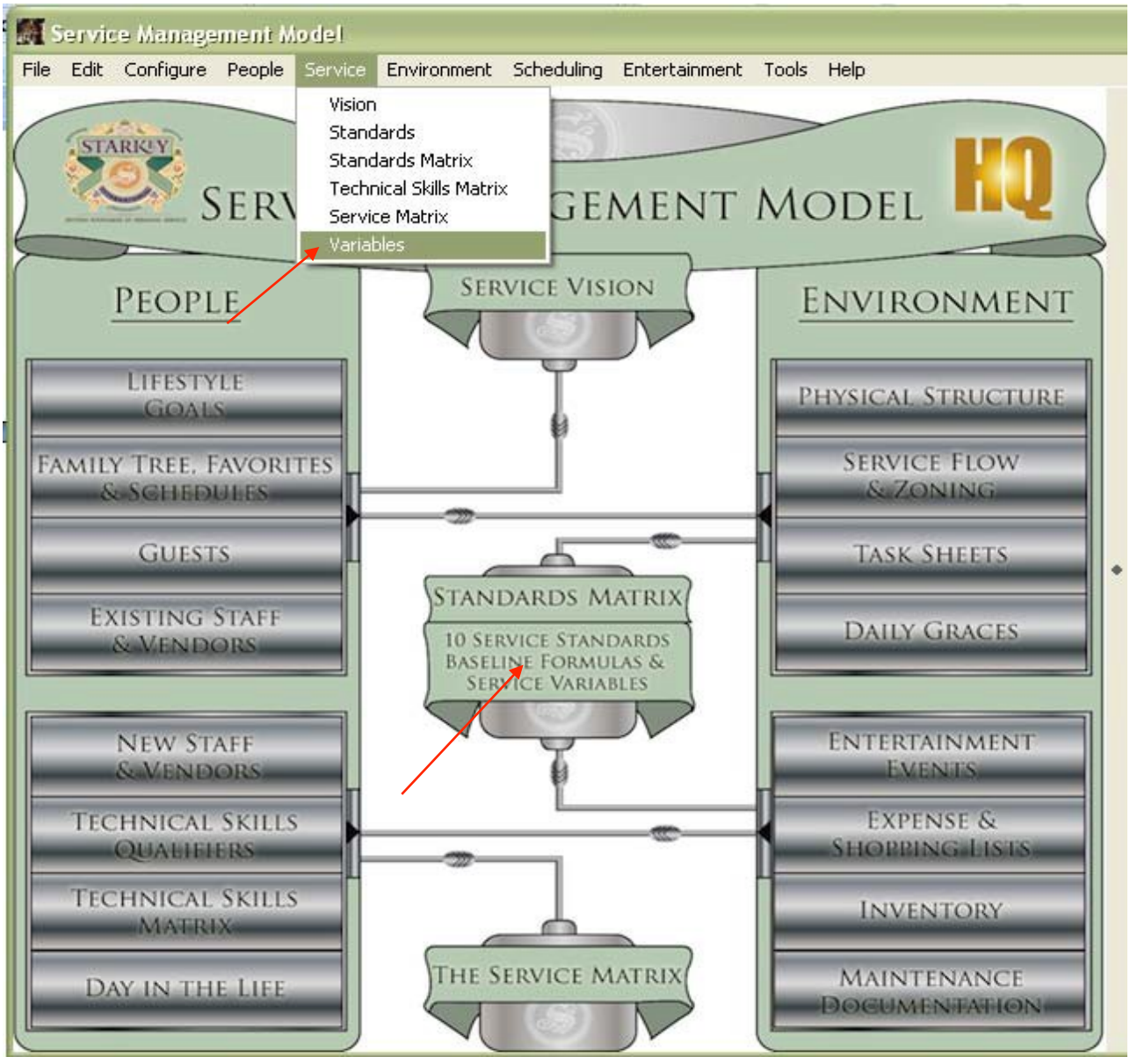
Section 12: Service Variables and Baselines

As you have learned there are Baselines for each of the 10 Service Standards. You have also learned there are variables that differ from the Baseline for each Environment.

The Starkey Software provides a tool for you to enter the variables that you know and that rarely change for your Environment.

1) Click **10 Service Standards, Baseline Formulas, & Service Variables** under the Standards Matrix box. Or, click **Service** / **Variables** from the main menu.



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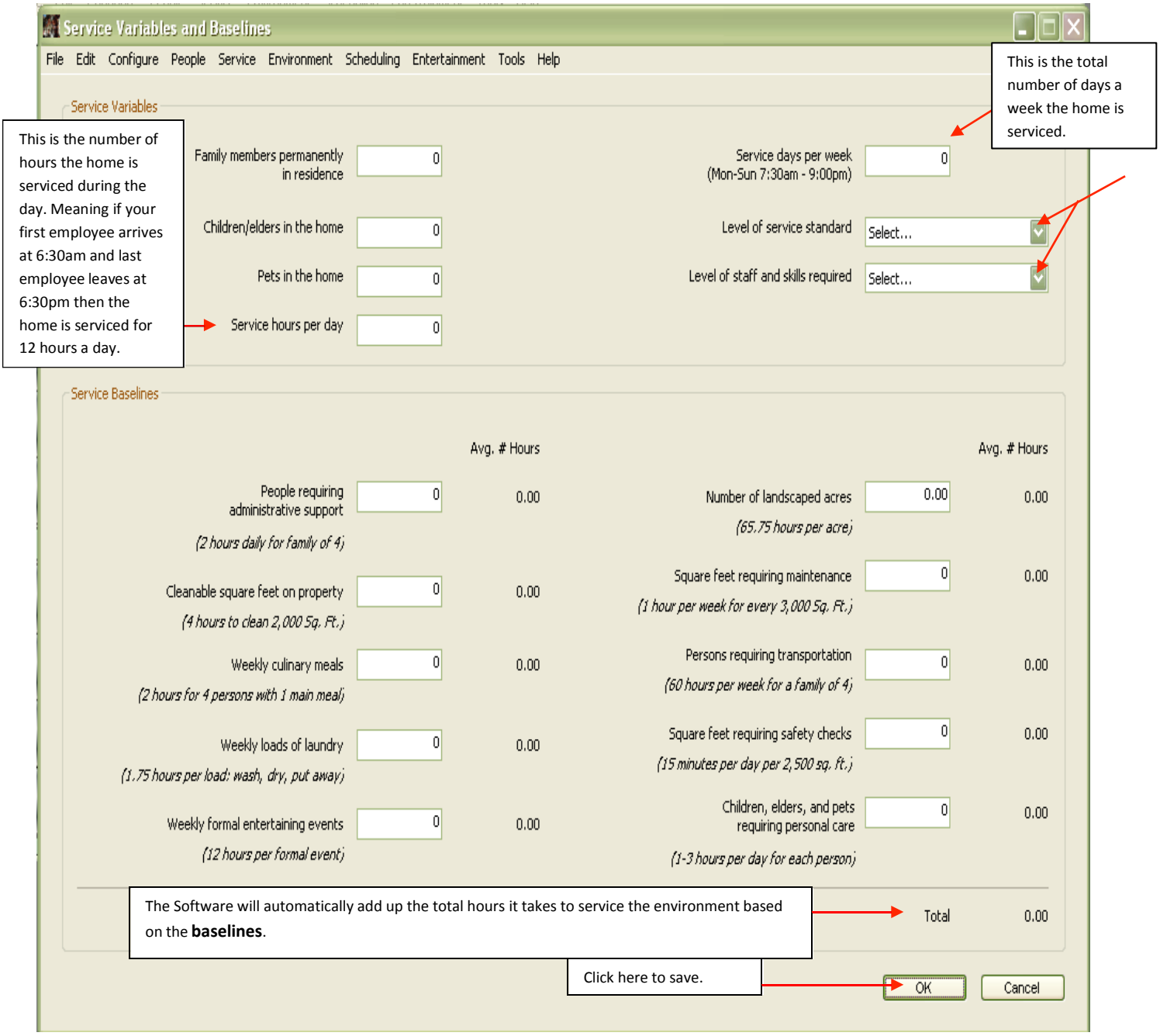
2) The Service Variables and Baselines screen will appear.
3) Click each box to fill in the information.
4) The software will automatically add the total number of hours based on the Starkey baselines at the bottom right hand corner of the screen. This is the number of hours the home should be serviced, but based on your variables, this number may be different. The variable hours are not reflected on this screen.


Service Variables and Baselines
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
This is the total number of days a week the home is serviced.
This is the number of hours the home is serviced during the day. Meaning if your first employee arrives at 6:30am and last employee leaves at 6:30pm then the home is serviced for 12 hours a day.
Service Variables
Family members permanently in residence
Children/elders in the home
Pets in the home
Service hours per day
Service days per week (Mon-Sun 7:30am - 9:00pm)
Level of service standard
Level of staff and skills required
Select...
Service Baselines
Avg. # Hours
People requiring administrative support
(2 hours daily for family of 4)
Cleanable square feet on property
(4 hours to clean 2,000 Sq. Ft.)
Weekly culinary meals
(2 hours for 4 persons with 1 main meal)
Weekly loads of laundry
(1.75 hours per load: wash, dry, put away)
Weekly formal entertaining events
(12 hours per formal event)
Number of landscaped acres
(65.75 hours per acre)
Square feet requiring maintenance
(1 hour per week for every 3,000 Sq. Ft.)
Persons requiring transportation
(60 hours per week for a family of 4)
Square feet requiring safety checks
(15 minutes per day per 2,500 sq. ft.)
Children, elders, and pets requiring personal care
(1-3 hours per day for each person)
The Software will automatically add up the total hours it takes to service the environment based on the baselines.
Total
Click here to save.
OK
Cancel

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5) When you are ready to print the Service Variables and Baselines:
    a. Navigate to the Service Variables and Baselines screen.
    b. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**
    c. Click **File** / **Print**.
    d. The print screen will appear for you to preview the document.
        i. Click **Print** in upper right hand corner to print.
        ii. Click the red X if you do not want to print.

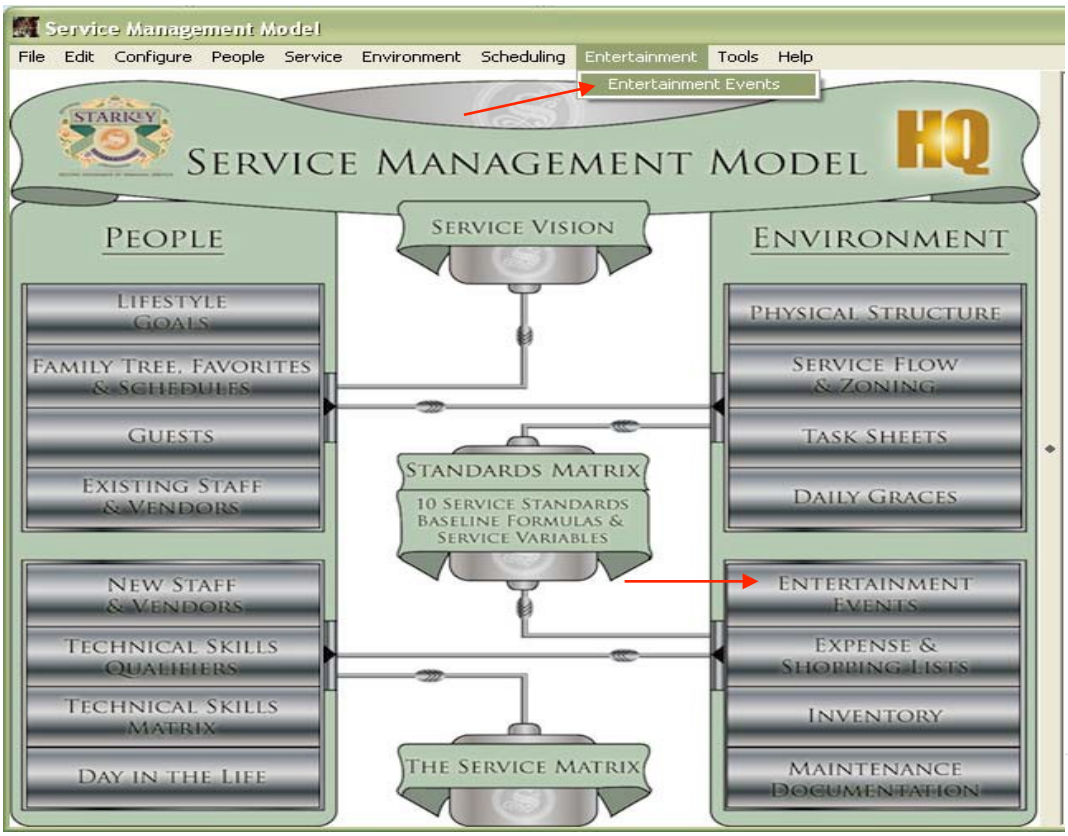
YOU SHOULD NOW HAVE PRINTED SERVICE VARIABLES AND BASELINES

Section 13: Entertainment and Events "The Ballet of Service"

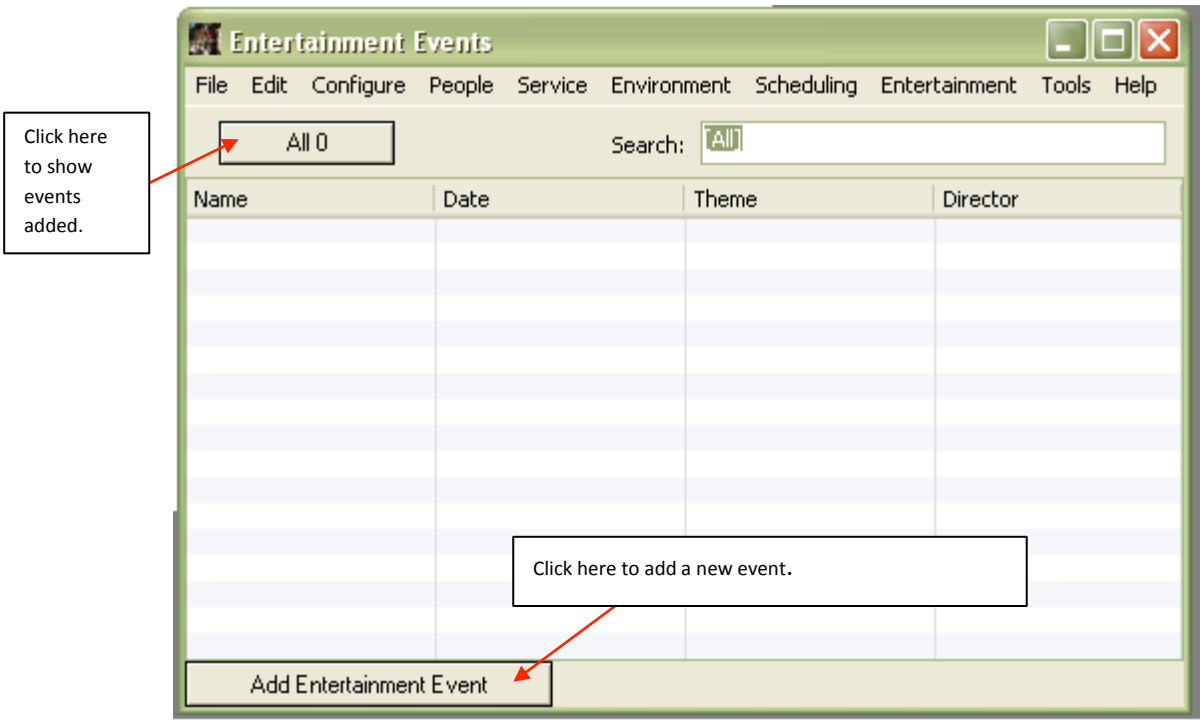
The Ballet of Service is known as the art of creating entertaining styles and practices unique to a particular Employer, Family, Resident, or Guest. All stages of an entertainment event must be choreographed, practiced, and theatrically produced, as a ballet might be. This artistic production will include the audience (Guests), the stage (room where the event will take place), the atmosphere (ambiance), the choice of props (china, silver, linen, table service), style of ballet (formal, informal, or buffet), and so on. Each Employer, Family, Resident, or Guest entertains in his/her own style to meet functional needs of his/her lifestyle, Service Environment, Guest, and nature of the event. Each Ballet of Service style should be rehearsed with Household or Service Manager and Service Staff to practice and perfect the service.

Within the Starkey Software under "Entertainment Events" you are able to fill out a Ballet of Service for an event.

1) Go to the main Service Management Model screen.
2) Click **Entertainment Events** under the Environment column. Or, click **Entertainment** / **Entertainment Events** from the main menu.



3) The **Entertainment Events** screen will appear.
4) Click **Add Entertainment Event** in lower left hand corner to create a new event.
    a. If you want to open an already created event, double-click the event in this window.



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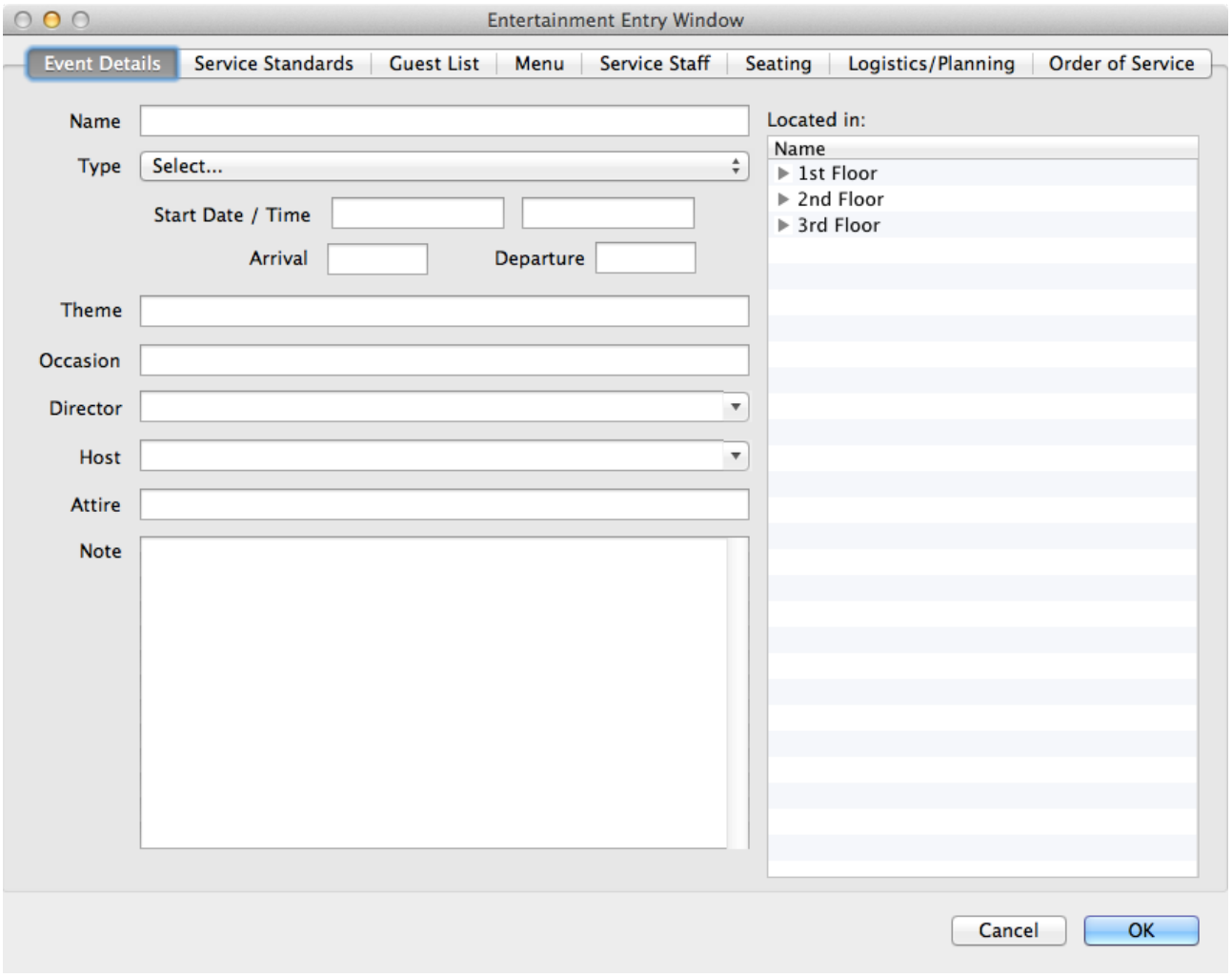
5) The **Entertainment Entry Window** will appear.



6) On the **Entertainment Event Entry Window** there are 8 tabs. The 8 tabs make up the Ballet of Service.
7) Like the people profiles and location profiles, to fill in a field, click the field you wish to enter and begin typing.
    a. On the **Event Details** tab you will see the location list appear on the right side of the screen. To expand the location list click the + symbol next to the location you wish to expand. Make sure to select the room(s) where the event will take place.
    b. Each tab has fields to fill out. If you see a + symbol, click it in order to fill in the fields.
    c. The **Guest List** tab must be completed prior to completing the **Seating** tab.

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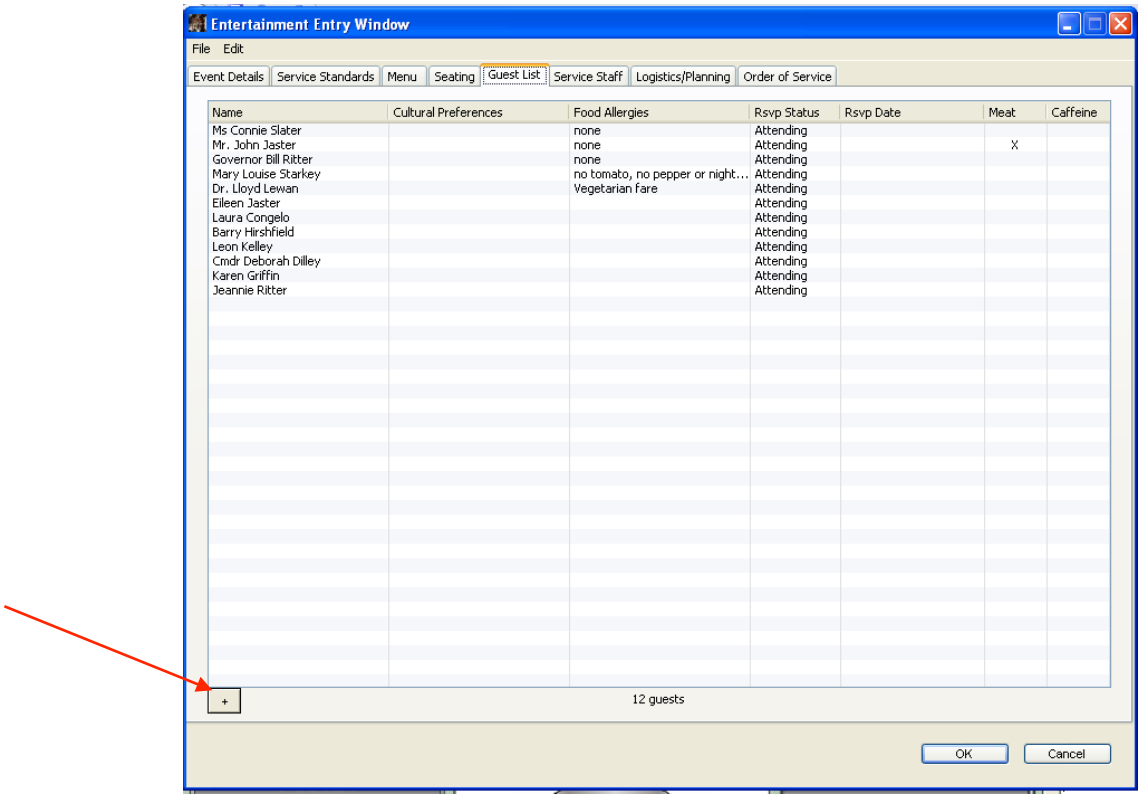
d. On the **Guest List** tab, click the + symbol to add a guest.

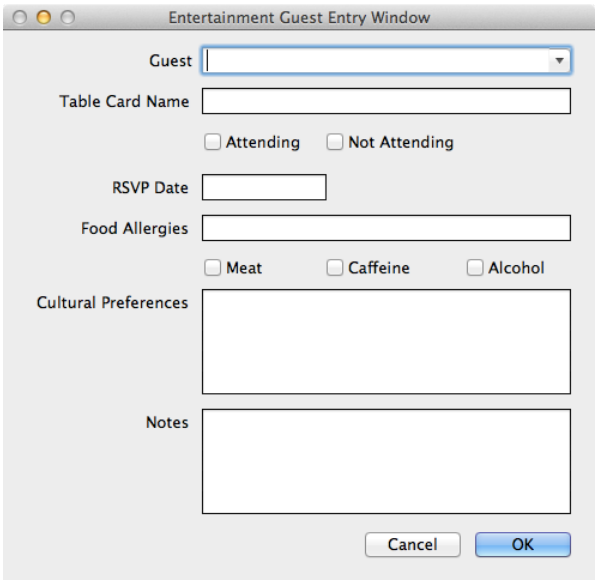
i. The **Guest** drop-down list displays names of people already added in the system. If the guest is not in the system, you do not need to fill in this field. If the guest appears in the **Guest** drop-down list, select the name.

ii. The **Table Card Name** is automatically filled in if you selected a name in the Guest drop-down list. If the guest did not appear in the Guest list, simply enter the name in the Table Card Name field for the guest.

iii. To make changes to a guest, double-click the name after it has been added.

iv. Be sure to include the host and/or hostess.





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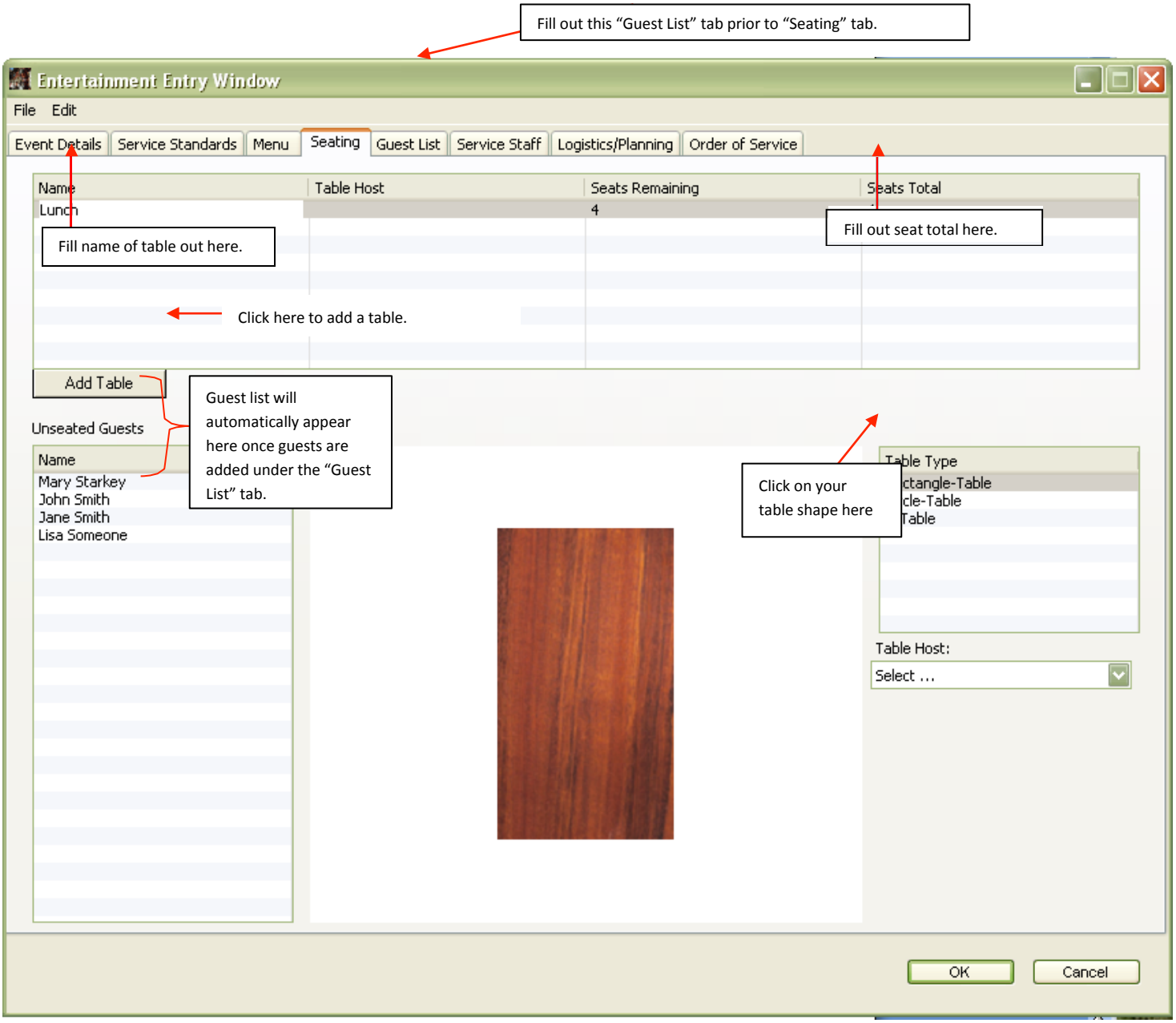
e. Once you have added all your guests, click the **Seating** tab.
f. The guest list you created in the **Guest List** tab appears on the left side of the screen under **Unseated Guests**.
g. Under the Seating tab, click **Add Table** to add a table. A rectangle table will automatically appear.
h. Type the **Name** of the table and tab to enter the number of **Seats Total** available.
i. To change the shape of the table, highlight the Name of the table then select the **Table Type** from the list of three in the **Table Type** box on right side.



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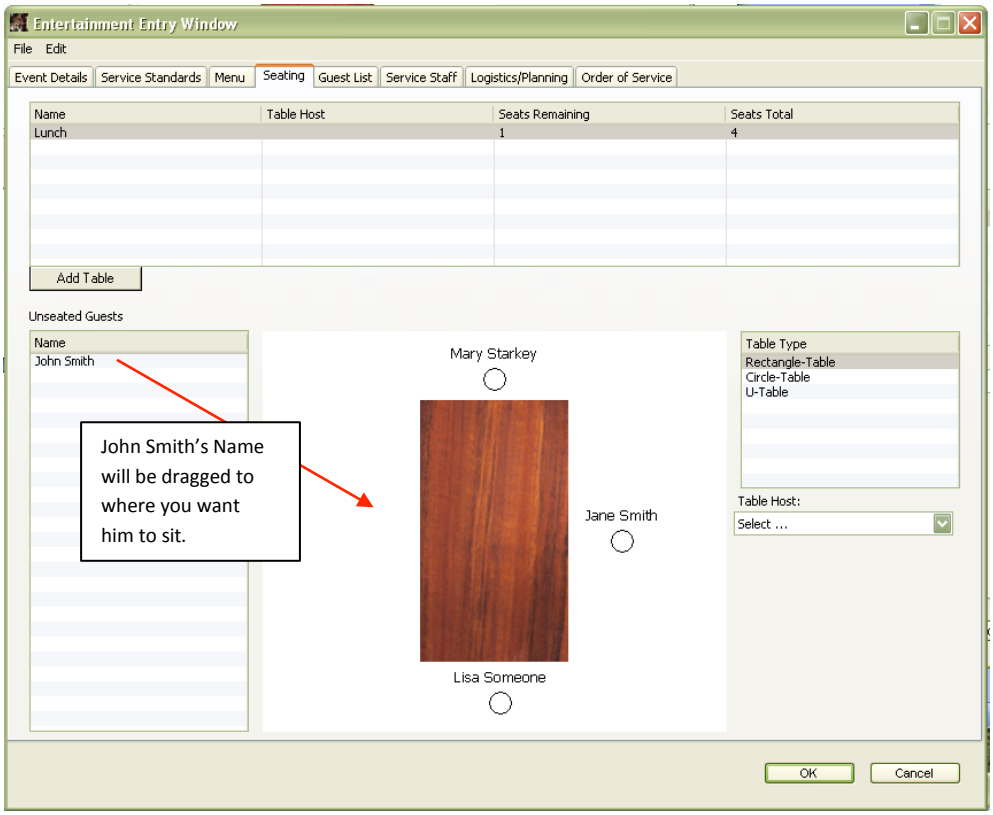
j. Once you have selected the shape of your table, drag the name of each guest to the spot where you want them to sit.

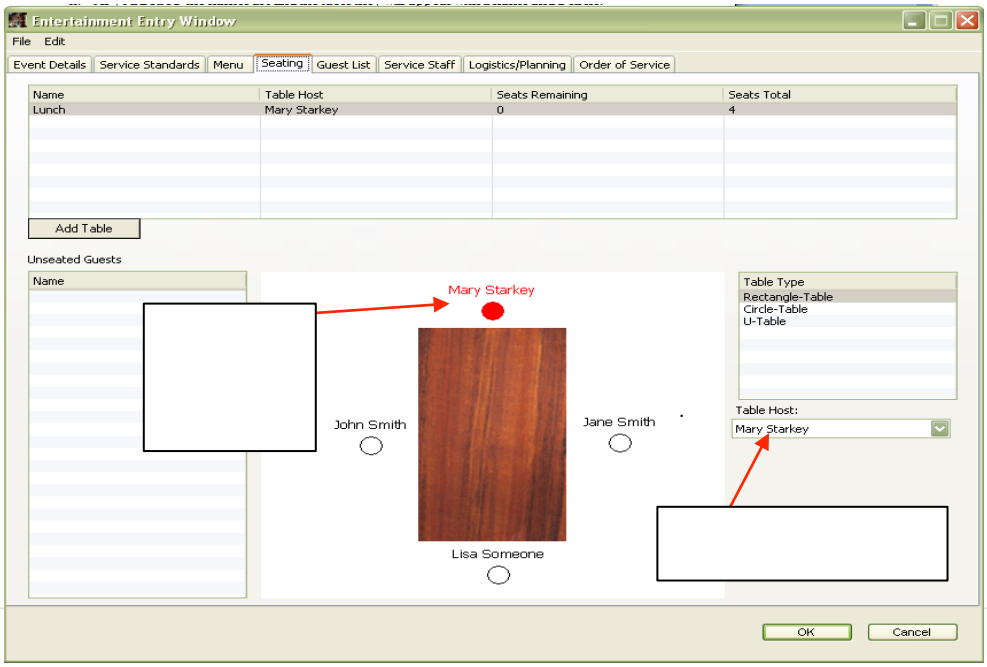
k. As you drag the names around the table they will appear with a name and a circle.



l. Once you have dragged the names of all the guests to where you want them to sit, you can now select a **Table Host**.

m. Click the **Table Host** drop-down menu on the right side of the screen under the table types.

n. Click the individual who is the host of the table. The name of the host will appear in red.



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o. If you need to navigate away from the **Entertainment Entry Window** at anytime, click **OK** to save.

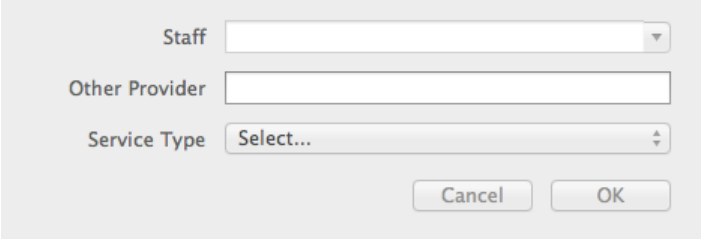
p. Click the **Service Standards** tab to fill in the information there.

q. Click the **Menu** tab to fill in menu information.

r. Click the **Service Staff** tab to add staff or the event. Click the **Staff** drop-down to select the staff member and press Tab on your keyboard. The name will appear in the **Staff** field and the **Other Provider** field.

Note: Like the Guest drop-down list on the Guest tab, the **Staff** drop-down list displays Staff already in the system. If the Staff is not in the system, leave the Staff field blank, and type the name of the provider in the **Other Provider** field.

Note: The **OK** button will not enable until the Other Provider field has data and the **Service Type** is selected.



s. Click the **Logistics/Planning** tab to enter the information there.

t. Click **the Order of Service** tab to enter the information there.

u. After you have filled out each tab and you are ready to print the event or the "Ballet of Service"

i. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**

ii. Click **File** / **Print** from the menu.

iii. The **Ballet of Service** print screen will appear for you to preview the document.

iv. Click **Print** in upper right hand corner to print. If you do not want to print click the red X in upper right hand corner.

YOU SHOULD NOW HAVE A PRINTED BALLET OF SERVICE

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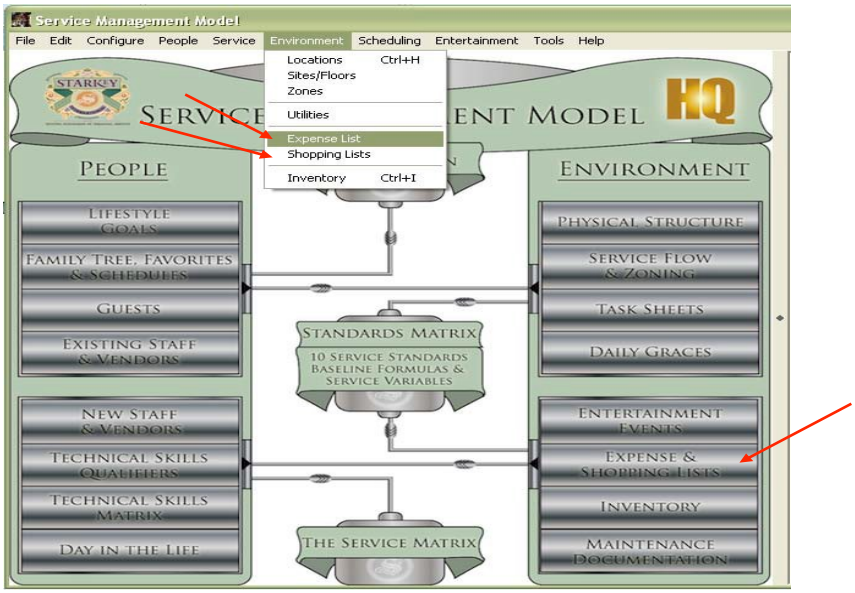
Section 14: Shopping Lists and Expenses

The Starkey Software allows you to create both shopping lists and expense sheets as an aid in the management process. In this section you will learn how to create a shopping list and save it for future use, as well as expense lists to make sure you are staying on budget.

1) Navigate to the main Starkey Management Model screen.
2) Click **Expense & Shopping Lists** under the Environment column. Both lists will appear in separate screens.
    a. Or click **Environment** / **Expense List** or **Environment** / **Shopping Lists** from the main menu depending on what you need.



    b. For this section we will start with **Shopping Lists**.
    c. On the main **Shopping List** window, to add a new shopping list, click **Add Shopping List** in the lower left hand corner.
    d. To open an old shopping list:
        i. Click **All (number)** on the upper left hand side.
        ii. Double-click the list you would like to open
        iii. Make changes as needed.
    e. If you are making a new list, after clicking **Add Shopping List**, the **Shopping List (new)** window will appear.
    f. Click + symbol to start adding items to the list.
    g. Also you can fill in the fields at the top by clicking on the field or drop-down menus.

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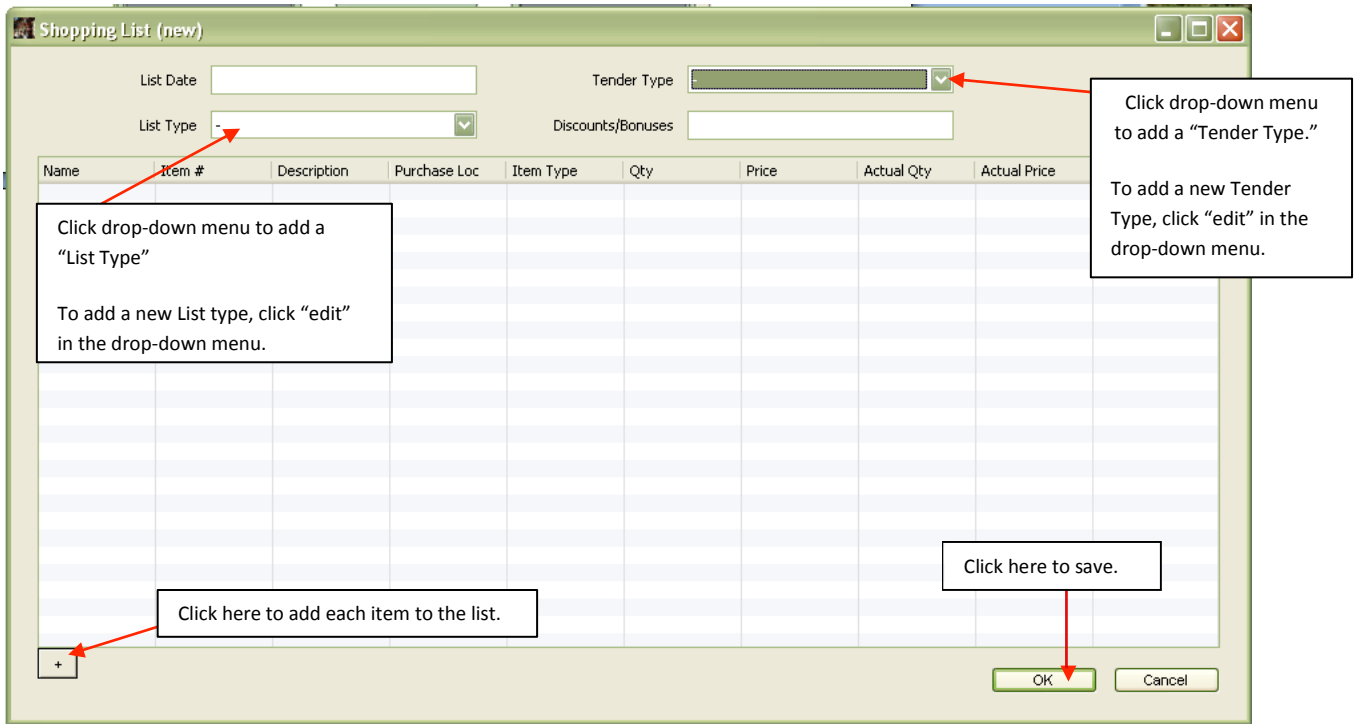

h. When you are ready to navigate away from this screen, click **OK** to save.

i. This will take you back to the main shopping lists screen.

3) When you are ready to print:

a. In the Shopping Lists window, highlight the list you wish to print by clicking the list.

b. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**

c. Click **File** / **Print** from the menu.

d. The print screen will appear allowing you to look at the document prior to printing.

i. To print, click **Print** in upper right hand corner.

ii. If you do not want to print, click the red X in upper right hand corner.

YOU SHOULD NOW HAVE A PRINTED SHOPPING LIST

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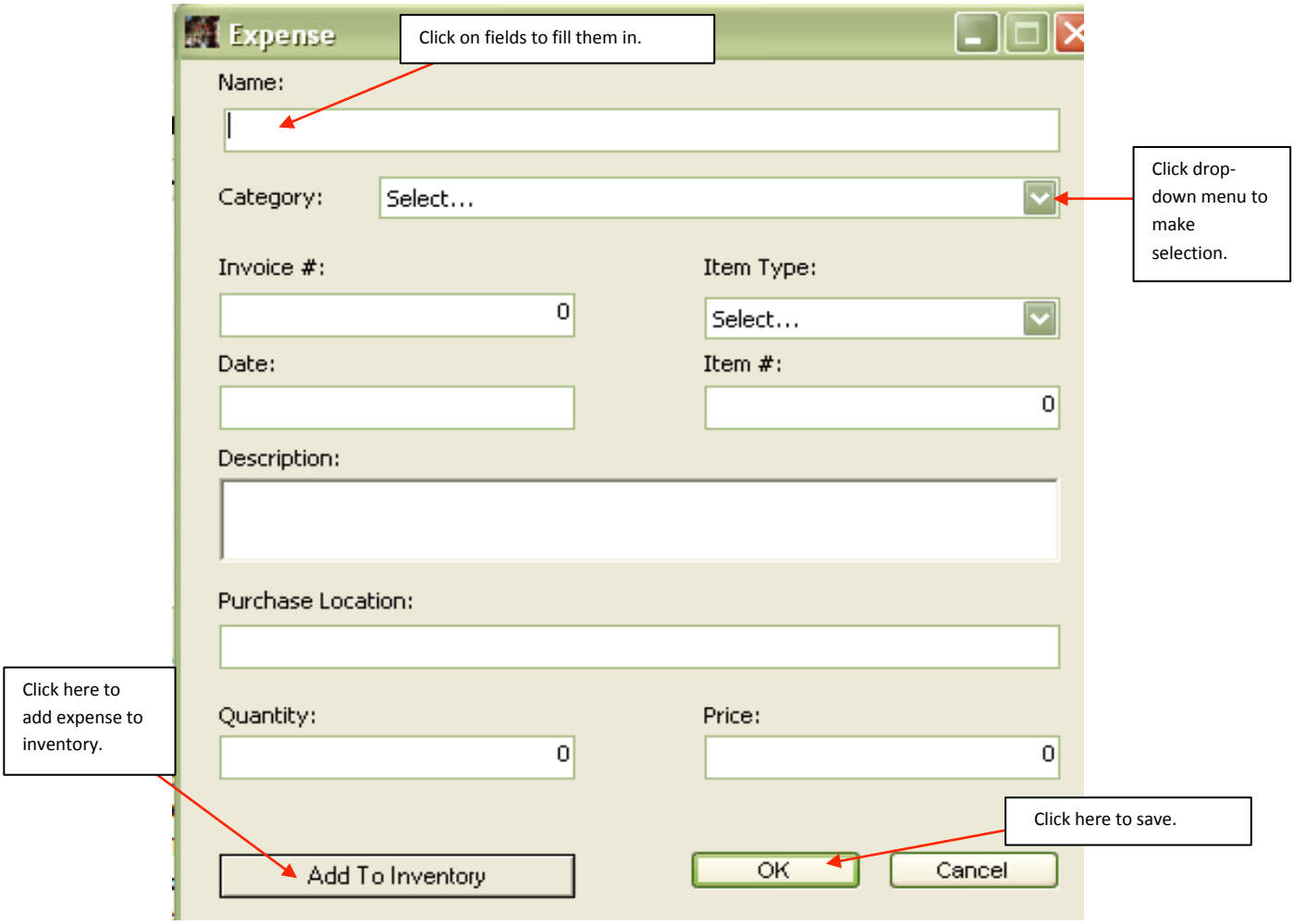
We are now ready to create an expense list.

1) Navigate to the main Starkey Management Model screen.
2) Click **Expense & Shopping Lists** under the Environment column. Both lists will appear in separate screens. Or click **Environment** / **Expense Lists** from the main menu.
    a. On the main **Expense** screen, to add a new expense, click **Add Expense** in the lower left hand corner.
    b. To open an old Expense:
        i. Click **All (number)** on the upper left hand side.
        ii. Double-click the expense you would like to open.
        iii. Make changes as needed.
    c. If you are making a new expense, after clicking **Add Expense** the **Expense** screen will appear.
    d. Click on the fields to type in them. Click drop-down menus if needed to make a selection for a field.
    e. Also you can add the expense to inventory by clicking **Add to Inventory** in the lower left hand corner.
    f. Click **OK** to save and navigate back to the main expense screen.



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3) When you are ready to print expenses:
    a. Navigate back to the main Expenses screen.
    b. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**
    c. Click **File** / **Print** from the menu.
    d. The print screen will appear allowing you to look at the document prior to printing.
        i. To print click **Print** in upper right hand corner.
        ii. If you do not want to print click the red X in upper right hand corner.

YOU SHOULD NOW HAVE A PRINTED EXPENSE REPORT

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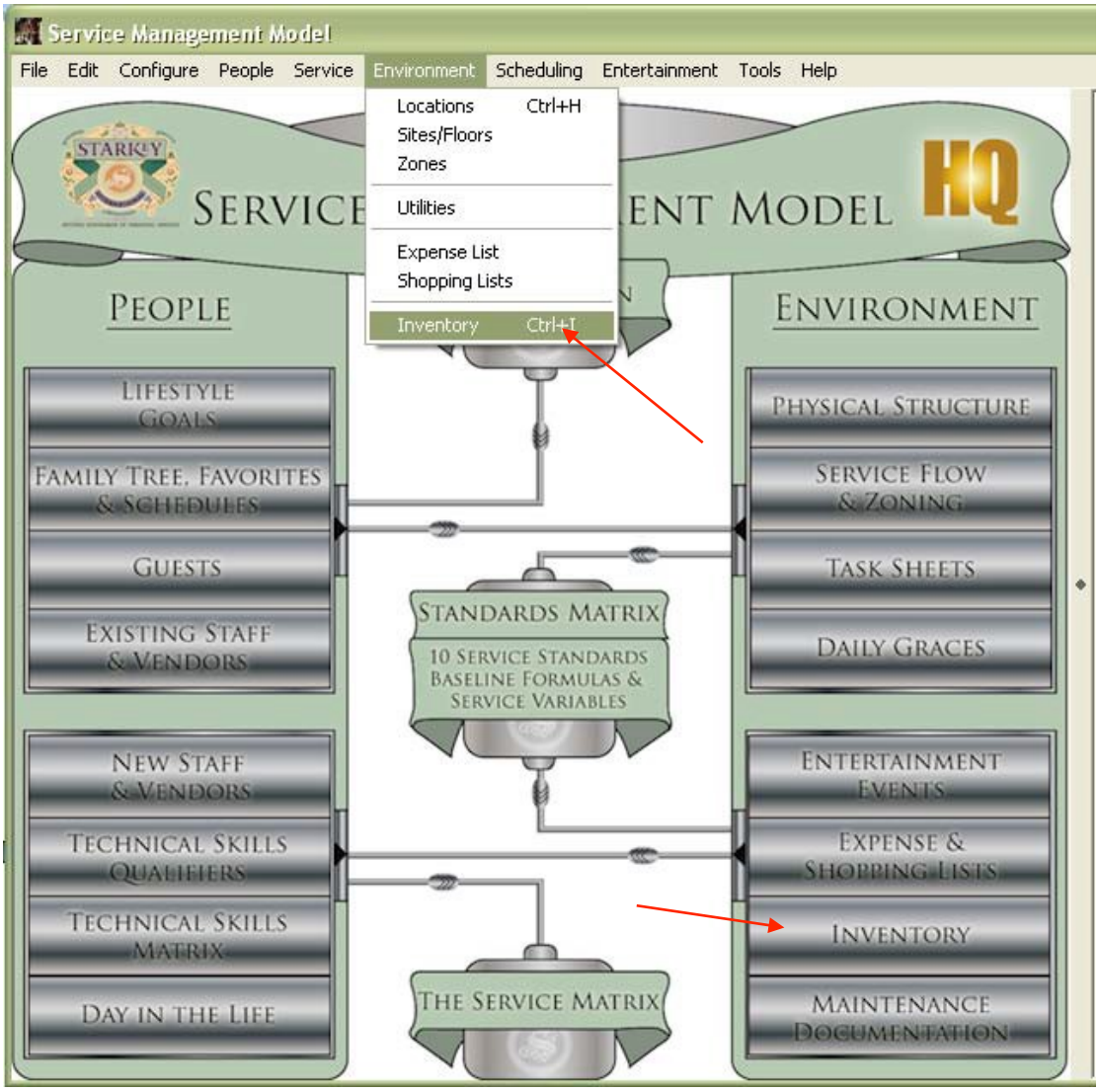
Section 15: Inventory

Inventory is an itemized or detailed list of objects or property within a Service Environment, including household items, food products, maintenance supplies such as light bulbs or tools, collectibles such as china, silver, antique automobiles, and other luxury items.

The Starkey Software has the ability to help you with the inventory process.

1) Navigate to the main Management Model screen.
2) Click **Inventory** under the Environment column, or click **Environment** / **Inventory** from the main menu.



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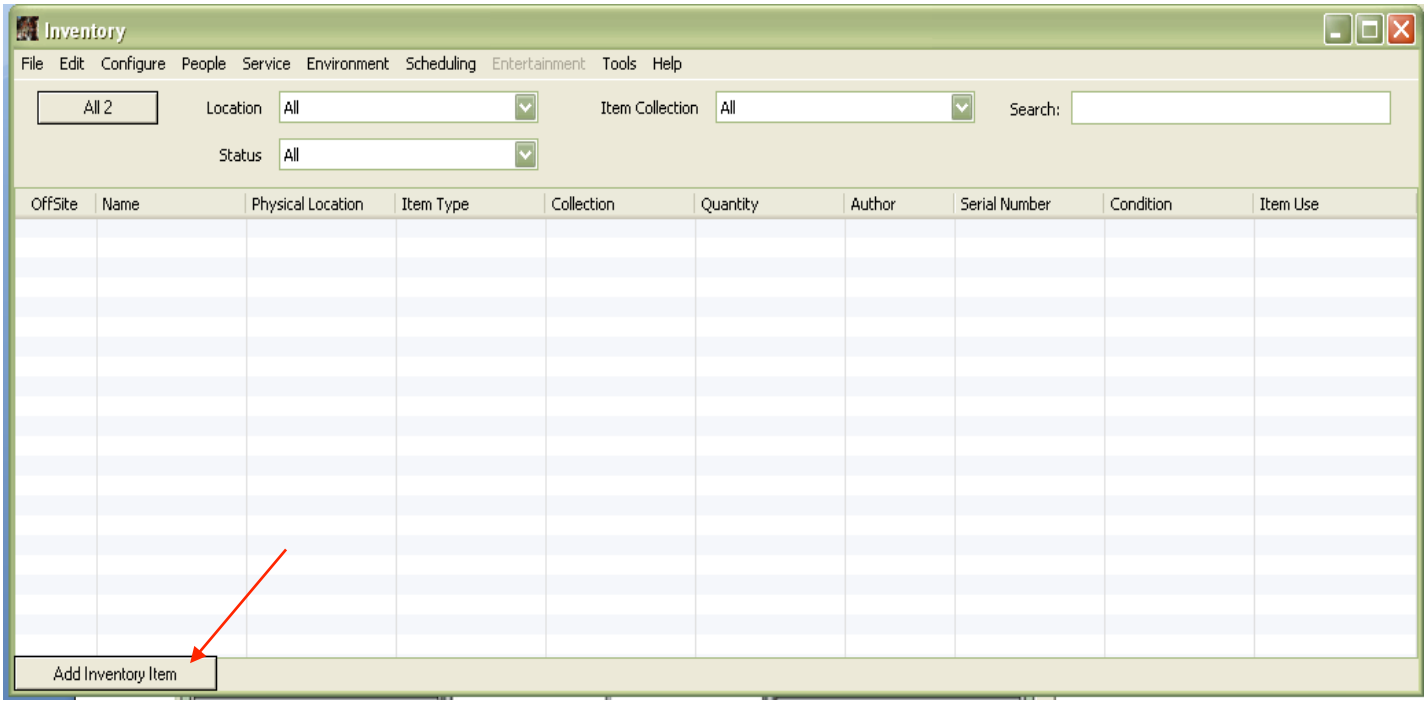
3) The main Inventory screen will appear.


Inventory
File Edit Configure People Service Environment Scheduling Entertainment Tools Help
All 2
Location All
Item Collection All
Search:
Status All
OffSite Name Physical Location Item Type Collection Quantity Author Serial Number Condition Item Use
Add Inventory Item

4) To view already added items click **All (number)** to show items added.
5) To add an inventory item, click **Add Inventory Item** in bottom left hand corner.

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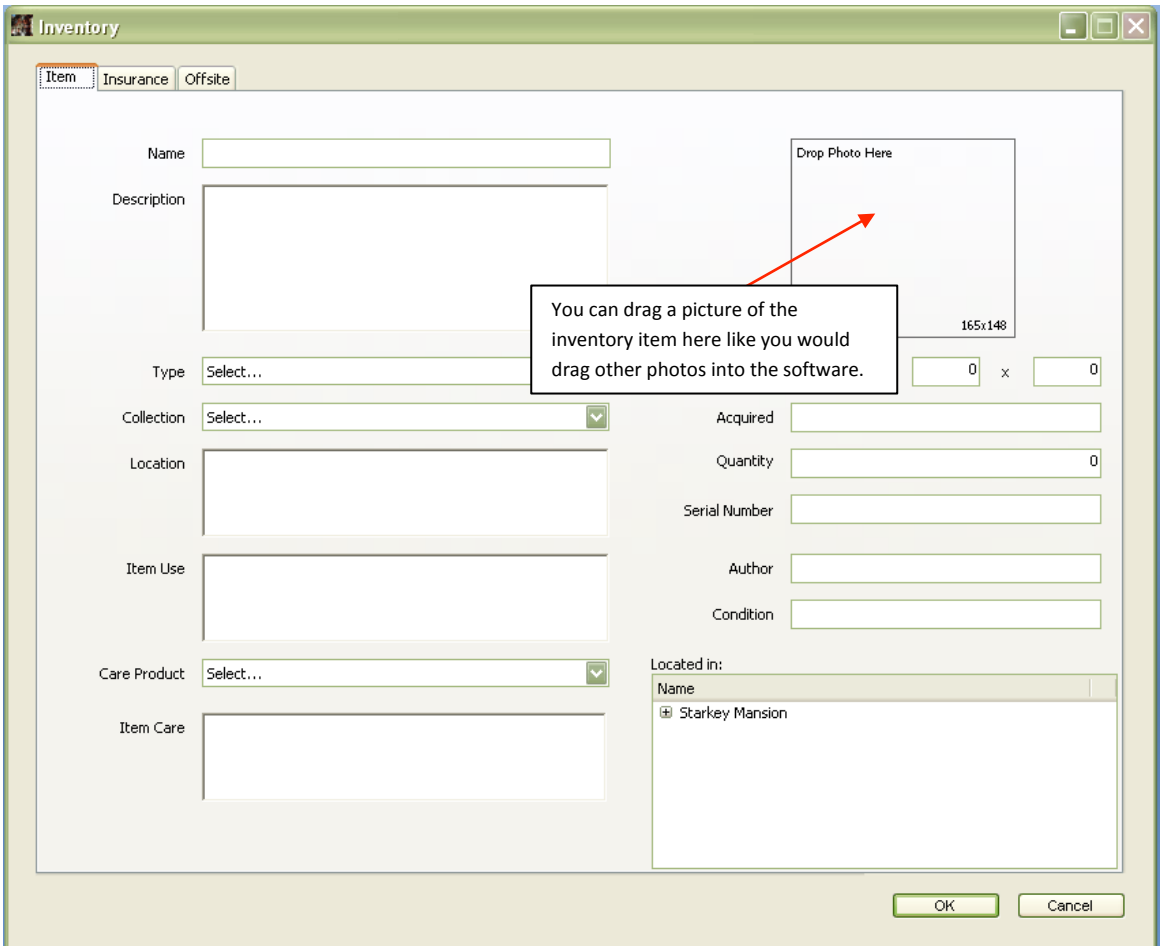
6) A new inventory profile screen will appear.
7) Three tabs make up the inventory profile: item, insurance, offsite.
8) To fill out the fields under each tab, click the field and begin typing.
9) For drop-down menus if you need to add a collection or care product, click **Edit** under the drop-down menu.
10) If you see the + symbol, click it to fill in the field.
11) You can add a picture of the item by dragging the picture in the same way you did before.
12) When you are ready to navigate away from any of the tabs, click **OK** to save.
13) If you are entering silver or china, type the pattern name into **Name** field, and type quantity, size, type, etc. into the **Description** box.



14) When you are ready to print an inventory item:
    a. Navigate to the main inventory screen.
    b. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**
    c. To print the entire inventory list, click **File** / **Print** from the menu.
    d. To print a single item, highlight the item by clicking it. Click **File** / **Print** from the menu.
    e. You will be asked whether you want to print the "Detail" report or the "List" report. Click your selection.
    f. The print screen will appear allowing you to look at the document prior to printing.
        i. To print, click **Print** in upper right hand corner.
        ii. If you do not want to print click the red X in upper right hand corner.

YOU SHOULD NOW HAVE A PRINTED INVENTORY LIST

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Section 16: Maintenance Documentation

The Maintenance Documentation area of the software allows you to enter maintenance items that need attention.

The Starkey Software has the ability to help you with documenting maintenance issues.

1) Navigate to the main Management Model screen.
2) Click **Maintenance Documentation** under the Environment column, or click **Environment** / **Maintenance Log** from the main menu.
3) The main Maintenance Log window will appear.
4) To view already added items click **All (number)** to show items added. You can sort by the Status of the item: Open, Closed or All.
5) To add a maintenance item, click **Add Item** in the bottom left hand corner.
6) A new Maintenance Item window will appear.
7) Enter the Reported Date and the Reported By fields.
8) Expand the Location and click where the maintenance item is located. A blue dot will appear to the right of your selection, and then the Location hierarchy will close.
9) Enter information in the other fields: Additional Location Details, Issue Description, and Service Provider.
10) When the maintenance item is finished, enter the Closed Date and the Closed By fields.
11) Click **OK** to save.
12) When you are ready to print a maintenance item:
    a. Navigate to the main Maintenance Log screen.
    b. Sort the items you want to print by selecting a Status: All, Closed, or Open.
    c. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**
    d. Click **File** / **Print** from the menu.
    e. The print screen will appear allowing you to look at the document prior to printing.
        i. To print, click **Print** in the upper right hand corner.
        ii. If you do not want to print, click the red X in upper right hand corner

YOU SHOULD NOW HAVE A PRINTED MAINTENANCE LOG REPORT

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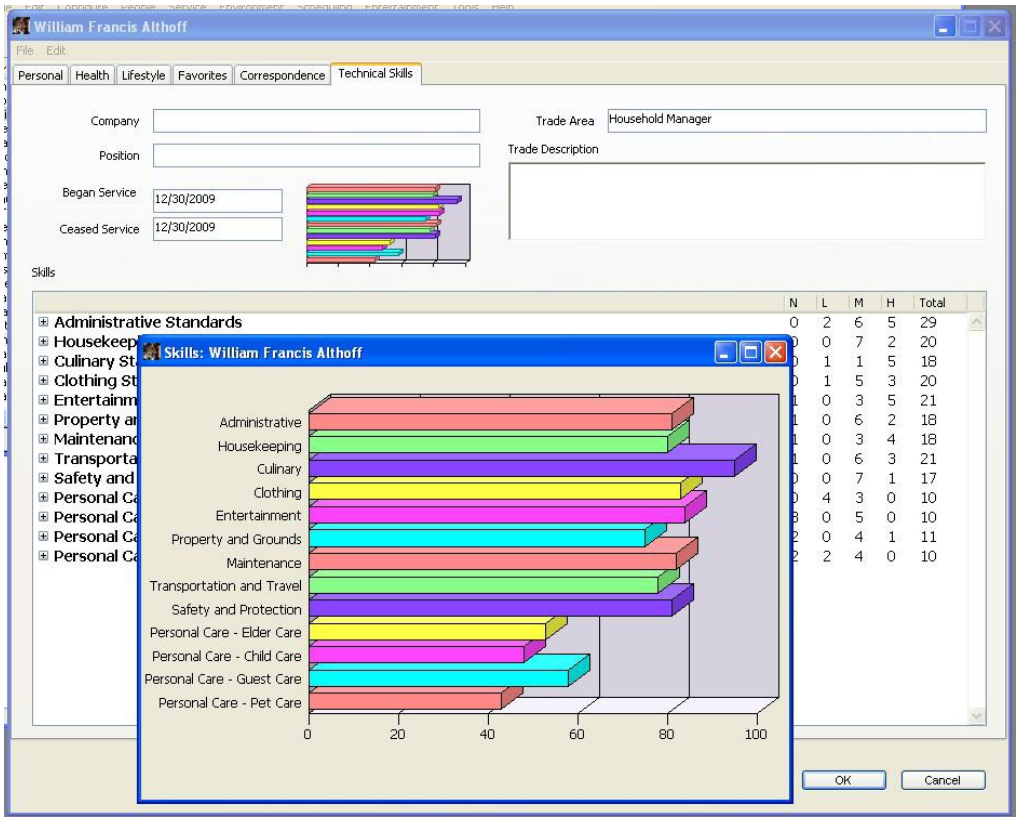
Section 17: New Staff and Vendors

In the Starkey Software when you click **New Staff and Vendors**, the Person Entry Window will appear. See **Section 1: The People** to enter information for individuals.

Section 18: Technical Skills Qualifier

In the Starkey Software the Technical Skills Qualifier can be found in the **Technical Skills** tab of the people profile for people who have the **Employee** box selected. See **Section 1: The People** for more information. Here is an example:



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Section 19: Technical Skills Matrix

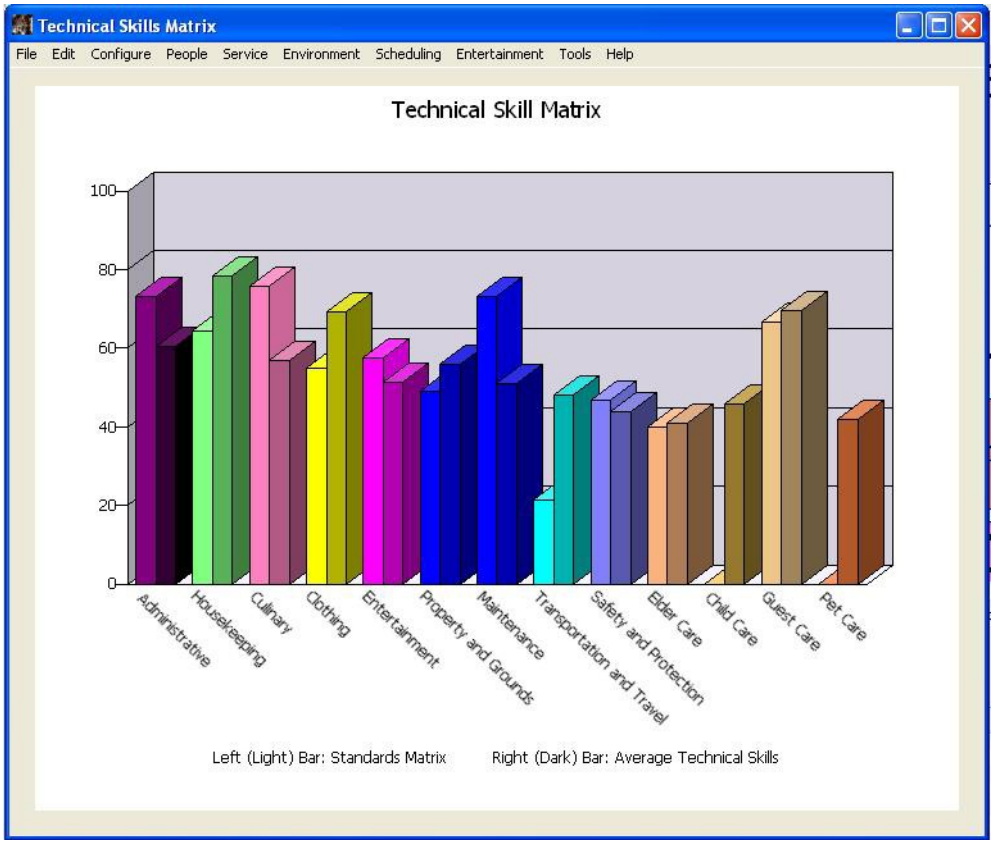
The Technical Skills Matrix is an ordered organizational array used to identify and evaluate the entire Service team's technical skills and specific qualifications in each of the Service Standards. The Technical Skills Matrix is essential in presenting the abilities of an entire staff. Each staff member can see how an overall team effort requires many different skills, expertise, and cooperative synergy. Each member works together to master the moment to provide a requested service.

In the Starkey Software the Technical Skill Matrix is created using the Standards Matrix (see section 10: The Standards Matrix) and all the Technical Skill Qualifiers (see previous page) you put into the software for your staff. Therefore you must fill out both the Standards Matrix for the household and the Technical Skills Qualifiers for the staff prior to looking at the Technical Skills Matrix.

To see the Technical Skills Matrix:

1) Navigate to the main Management Model screen.
2) Click **Technical Skills Matrix** under the people column, or click **Service** / **Technical Skills Matrix** from the main menu.
3) The **Technical Skills Matrix** will appear as a graph.
    a. If you entered colors for your standards (see Section 11: The 10 Service Standards) the graph will appear in the colors you selected.

Here is an example:



4) To print the Technical Skills Matrix:

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a. Have the **Technical Skills Matrix** open.
b. For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**
c. Click **File** / **Print** from the menu.
d. The print screen will appear allowing you to look at the document prior to printing.
    i. To print, click **Print** in upper right hand corner.
    ii. If you do not want to print click the red X in upper right hand corner.

YOU SHOULD NOW HAVE A PRINTED TECHNICAL SKILLS MATRIX

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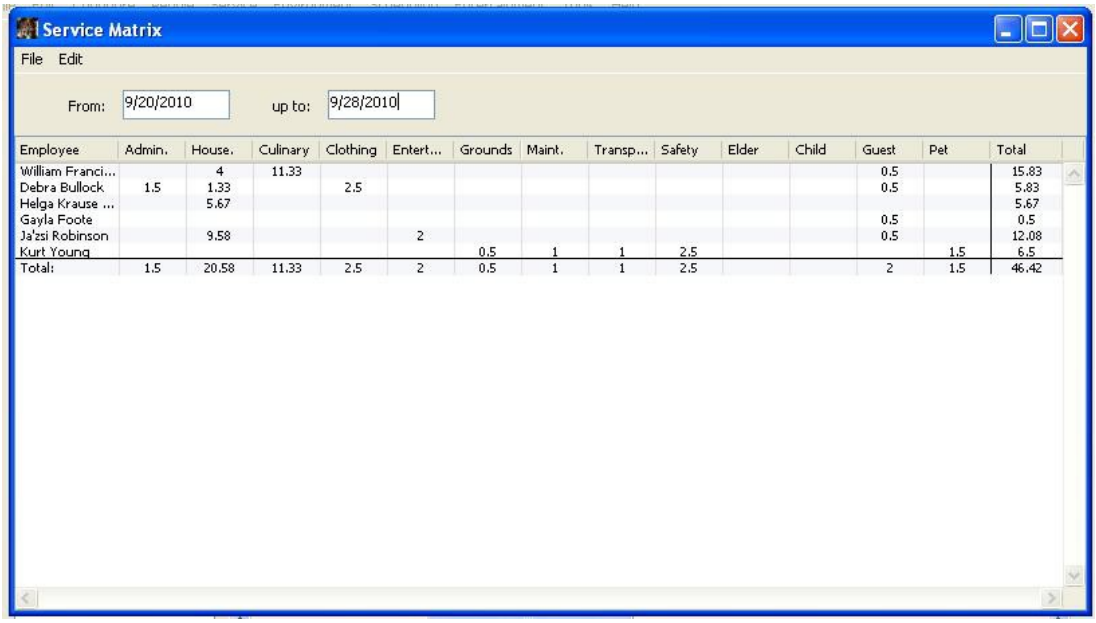
Section 20: Day in the Life

See Section 5: Family Schedules and Day in the Life.

Section 21: The Service Matrix

Hours will automatically drop into the Service Matrix by employee as you create Tasks. To check the hours you want to make sure they are close to the Variables and Baseline hours (see Section 12: Service Variables and Baselines) If not, perhaps the user did not enter standards on tasks. The user may need to go back and make sure all tasks have a service standard.



Employee	Admin.	House.	Culinary	Clothing	Entert...	Grounds	Maint.	Transp...	Safety	Elder	Child	Guest	Pet	Total
William Franci...		4	11.33									0.5		15.83
Debra Bullock	1.5	1.33		2.5								0.5		5.83
Helga Krause ...		5.67												5.67
Gayla Foote												0.5		0.5
Ja'zsi Robinson		9.58			2							0.5		12.08
Kurt Young						0.5	1	1	2.5				1.5	6.5
Total:	1.5	20.58	11.33	2.5	2	0.5	1	1	2.5			2	1.5	46.42

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Section 22: Configuring the Software: Windows and Mac

On Windows, the main Service Management Model has an option on the toolbar called **Configure**. This tool will allow you to configure different categories of the software to your needs and wants based on the household. We will now explore each category under configure.

Windows: To configure Expense Categories

1) Click **Configure** / **Expense Category** from the main menu.
2) The Expense Categories screen will appear.
3) In this category you can configure the different expenses you will use. You can add, change, and delete the items in the list.
4) Click the + symbol next to a standard.
5) A list of expenses will appear for that standard.
6) To add a Category to a standard, highlight the standard and click **Add Category**. Type the name of the subcategory and press Enter when finished.
7) To modify a Category, double-click the category to make the cursor appear in the text. Modify the text as needed and press Enter.
8) To delete a subcategory highlight the subcategory, and press Delete on your keyboard.
9) You can do this for each Standard Category in this window.
10) For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**
11) To Print, click **File** / **Print** from the menu.
12) When finished, click **OK** to save.

YOU SHOULD NOW HAVE CONFIGURED YOUR EXPENSES

Windows: To configure Inventory Item Types

1) Click **Configure** / **Inventory Item Type** from the main menu.
2) The Inventory Item Type Values screen will appear.
3) You can add, modify, and delete Inventory Item Type Values.
4) To add a value, click the + symbol, type the new value and press Enter.
5) To modify a value, double-click the value to make the cursor appear in the text. Modify the text as needed and press Enter.
6) To delete, highlight the value and press Delete on your keyboard.
7) Click **OK** to save or navigate away from this page.

YOU SHOULD NOW HAVE CONFIGURED INVENTORY ITEM TYPE VALUES

Windows: To configure Entertainment Service Type Categories

1) Click **Configure** / **Entertainment Service Type** from the main menu.
2) The Entertainment Service Type Values screen will appear.
3) You can add, modify, and delete Entertainment Service Type Values just as you did with Inventory Item Types.
4) Click **OK** to save or navigate away from this page.

YOU SHOULD NOW HAVE CONFIGURED ENTERTAINMENT SERVICE TYPE VALUES

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Mac: To configure Expense Categories

1) Click Environment / Expense List from the main menu.
2) The Expenses screen will appear.
3) Click **Add Expense.**
4) Click the **Category** drop-down list.
5) Scroll to the bottom and click **Edit** in the list.
6) The Expense Categories screen appears. You can configure the different expenses you will use. You can add, change, and delete the items in the list.
7) Click the arrow next to a standard. A list of expenses will appear for that standard.
8) To add a Category to a standard, highlight the standard and click **Add Category**. Type the name of the subcategory and press Enter when finished.
9) To modify a Category, double-click the category to make the cursor appear in the text. Modify the text as needed and press Enter.
10) To delete a subcategory highlight the subcategory, and press Delete on your keyboard.
11) You can do this for each Standard Category in this window.
12) For Windows users: Click **File / Page Setup**. Set the Margins for the report to **0.5** for the Left, Right, Top and Bottom margin. Click **OK.**
13) To Print, click **File** / **Print** from the menu.
14) When finished, click **OK** to save.

Mac: To configure Inventory Item Types

1) Click **Environment/ Inventory** from the main menu.
2) Click **Add Inventory Item**.
3) Click the **Type** drop-down list.
4) Scroll to the bottom and click **Edit** in the list.
5) The Inventory Item Type Values screen will appear.
6) You can add, modify, and delete Inventory Item Type Values.
7) To add a value, click the + symbol, type the new value and press Enter.
8) To modify a value, double-click the value to make the cursor appear in the text. Modify the text as needed and press Enter.
9) To delete, highlight the value and press Delete on your keyboard.
10) Click **OK** to save or navigate away from this page.

Mac:To configure Entertainment Service Type Categories

1) Click **Entertainment** / **Entertainment Events** from the main menu.
2) The Entertainment Events screen will appear.
3) Click Add Entertainment Event. The Entertainment Entry Window appears.
4) Click the **Type** drop-down list.
5) Scroll to the bottom and click **Edit** in the list.
6) You can add, modify, and delete Entertainment Service Type Values just as you did with Inventory Item Types.
7) Click OK to save or navigate away from this page.

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